

Our Work Agreement

We will provide you with the following kinds of services: *(as checked)*

☐ Individual Tax Preparation: ☐ Business Tax Preparation

Here are the terms of our professional relationship:

1. We will prepare our work product based only on information which you have given us. You represent that you will provide us with information which is complete, true and correct, disclosing all relevant facts. We will restrict our services to those which are shown above with no continuing obligation to update or provide other services. We don't file extensions unless asked to do so.
2. You've reviewed our tax organizer and completed it as best as you can. (We will review the tax organizer, and in some cases, we may assist in completing it by documenting things that you tell us. This is to be construed as if you prepared it in your own handwriting.) The IRS says it is your responsibility that all items of income and expense are properly included and presented on your tax return. You promise to review the returns carefully before signing and/or submitting for 8879 (E-filing forms).
3. We will, if possible, e-file your returns upon receipt of a signed 8879 forms. It is possible your e-filing may be rejected, in which case we will prepare returns for paper filing. There will be an additional charge for re-compiling the returns for paper filing.
4. You are aware of IRS record keeping and documentation requirements and you represent that you have the necessary documentation. You understand we won't audit or verify your information.
5. It is possible you may receive a notice for additional tax, or for clarification of items. You promise you will contact us if you receive any communication from any taxing authority. Additional work required including responding to any inquiries from tax authorities, tax planning, amended returns or audit work will be billed at our regular hourly rate.
6. There may be elections and decisions in your return which could be challenged by tax authorities. If we believe we see a gray area, we will discuss it with you. We are required by law to disclose any position on a return for which there is a reasonable probability of challenge. Tax law is ever-changing. It is possible that you may be assessed additional tax, interest, or penalties. We will try our best, we are human, and occasionally make mistakes.
7. Penalties on underpayment, late filing or failure to file on time are interest on unpaid tax and are your responsibility. If you receive a penalty imposed as a result of our error, we will reimburse you for the penalty or credit your account at our option.
8. You understand what was involved in preparation of your return, and acknowledge that the return was prepared with your informed consent. You agree to the reasonableness of our bill and terms of payment. (upon presentation)
9. We will return all original source documents provided to us. We routinely scan and keep some copies of some supporting documents, but we are not the custodian of your records, and you cannot rely upon us to maintain support for your tax return; that is your responsibility. By accepting the return, you acknowledge the return of all original source documents.
10. Should there be any disagreement of any sort between us, you agree to mediation. If mediation is unsuccessful, you agree to binding arbitration under the rules of the American Arbitration Association. The limit of time for making a claim arising from our services is one year after the services are rendered.
11. Advice, suggestions, and opinions which are given informally, orally or via email, do not have the same force and effect of a formal written opinion, and should not be relied upon to the same degree. The IRS says that any advice which you receive from us, either in writing or orally, cannot be used as a defense against the assessment of a penalty.
12. In the case of work product covering more than one party, the undersigned enters into this agreement on behalf of all affected parties. (i.e. husband signing for both spouses)
13. If any provision herein is inoperative, the remainder of this agreement shall remain in full force and effect. This agreement is intended as the complete agreement and can only be modified in writing, signed by both of us.

Read, understood and agreed to on ____ / ____ / ____

Signature

Spouse's Signature