# Tax Preparation Service Agreement

for tax year(s) _____

You agree to retain The Tax Lady LLC for tax preparation services under these terms and conditions:

The Tax Lady LLC (TTL) charges a fee for each form needed to complete your tax return. Prices range from $50 for simplest, easiest forms to $600 for more complex returns that have itemizing, rental properties and small businesses on them. Please know, the total cost for tax preparation is best known once the return is complete and all required forms are known. Therefore, any quote provided to you prior to completing your tax return is subject to change.

TTL prepares tax returns using data and documentation you provide. By signing this contract, you agree to make available all details regarding income and deductions so that accurate information is reported to the appropriate tax agencies. TTL agrees to take all steps deemed appropriate with your best interest in mind, while complying with all requirements of the State(s) and Internal Revenue Code. Upon completion, it is your responsibility to review the documents prepared before signing them to verify the data is true and correct. As we prepare the return, if we encounter instances of unclear tax law or conflicts in the interpretation of the law, TTL will outline the reasonable courses of action and the risks and consequences of each. Ultimately, the alternative you select will be adopted.

Unless you choose a refund transfer service, no work product prepared by TTL is released to you or electronically filed for you until your balance due for this service is paid in full. A refund transfer service allows you to have your tax preparation fees deducted from your refund; however, if you choose this option and your refund is taken to pay federal or state debts (e.g., back taxes, child support, student loans, etc.), you are responsible for paying TTL for tax preparation services and agree to pay for such services in full as soon as you become aware.

Once your tax return is completed, TTL will return to you all original documents and provide you with a complete copy of the return. It is your responsibility to securely store these materials along with all supporting data (e.g., receipts, canceled checks, etc.) for three to seven years. After you sign all required documents, your tax return will be submitted electronically, and this engagement will conclude. If you request the TTL not to e-file your return, you are solely responsible for submitting the return to the appropriate tax authorities. If you misplace the copy TTL provides to you, you may request additional printouts or electronic copies (using secure data encryption methods) for $25.

If you are a new customer, please leave a $25 nonrefundable good faith deposit indicating you would like the TTL to begin work. The deposit is applied toward your tax preparation fees. You or TTL is free to terminate this arrangement at which time your original papers are returned to you. TTL will keep the $25 deposit for services rendered.

To affirm this document correctly summarizes your understanding of the arrangements for preparing your tax return, please sign below. The Tax Lady LLC appreciates your confidence.

Received & Understood: _____ Date: _____

Print Name: _____

Received & Understood: _____ Date: _____

Print Name: _____

Agreed: The Tax Lady LLC by Kaye Alvarez, EA _____ Date: _____

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