

## **Fixed Fee With Guarantees**

**(This Fee and Guarantee Disclosure is an Exhibit to the Engagement Letter)**

It is our goal to provide awesome service to every one of our customers. **Please take the time to read the enclosed information carefully and completely.**

### **Our Guarantees to You**

- We will have your **2023** individual tax returns ready within      **days or sooner.** 1
- We will provide **free phone calls** for all **2024.** 2
- We will provide **free electronic filing.** 3
- We will return your phone **calls** within      **business days.**
- We will provide a regular **electronic newsletter** of tax advice. 4
- We will start your **appointment within**      **minutes** of the scheduled time. 5
- We are **responsible for penalties** related to our preparation errors. 6
- We \_\_\_\_\_

### **The Investment**

- Your **all-inclusive** investment with us, assuming no material changes from last year, will be \$    . 7
- **The investment is payable when your returns are completed or sooner.**
- You can pay by cash, check, or credit card including AX, VISA, Discover Card, and MasterCard.
- There will be a \$     re-run charge for client changes after our completion and a 10% surcharge for all returns received after **9/1/2024.** 8

### **Your Guarantees to Us**

- You will do your best to accumulate your tax information in an orderly manner and submit the information as early as possible.
- You will punctually attend your appointment and have your complete information or call us to reschedule at least 72 hours in advance. 7
- You understand no appointments will be scheduled between **March     , 2024** and **April 15, 2024.**
- You will make an effort to refer at least one client like yourself to our firm so that we can continue to be here for you when you need us.

1. All information must be received prior to **March     , 2024**
2. If the question or issue requires additional research and analysis beyond the consultation, that work will be subject to an additional price quotation before the service is performed where possible.
3. You will always receive a **paper or e-file** copy. If a government authority does not accept e-filing or certain information invalidates e-filing, we will prepare your return for paper filing.
4. You must provide us with a valid e-mail address and a signed "Consent to Use of Tax Return Information" form to receive the newsletter. If married, both spouses must sign.
5. You need only be in our office by the appointed time.
6. We work hard not to make errors on your tax return. If you have given us complete and accurate information and we fail to properly prepare your returns based on that information, we will pay the penalties associated with the error.
7. Your fee can be adjusted upward or downward based on material changes from last year. You will be notified of upward adjustments before the service is performed where possible.
8. Once we have finished the return and you make changes, we will assess a minimum \$     re-run charge each time. We will add a 10% surcharge when the return information is received after **9/1/2024.**