This agreement is between Hamilton Financial ® (The Tax Professional) and You (The Taxpayer).

Sharlah Shereé Hamilton Hamilton Financial ® PH # 305-968-3883

1. Hamilton Financial ® will:

- Give a FREE 15 min consultation to review your personal tax situation. We will explore the most favorable filing status to use, we will review your tax documents with you and discuss the credits and deductions you deserve. We promise to properly prepare your taxes using all the forms you need to file with the IRS. We promise to discuss your completed tax return results with you. We promise to deliver a completed return and offer suggestions to help maximize your finances in future years.

2. Representation:

- Should the need arise, Hamilton Financial ® may refer a client to a Certified Public Accountant. One qualified in our network and certified to speak to the IRS on your behalf.

3. Availability:

- Hamilton Financial ® is open during tax season and after tax season. By Appointment only (as needed).

4. Delivery of Completed Tax Results

Completed tax results will be provided following full payment of services rendered or the client has agreed to have payment deducted from tax return refund.

After submitting to the IRS, if payment is not deducted from tax return for any reason, full payment must be received before receiving a copy of completed tax returns.

- Taxpayers may receive a copy of their tax results as a hard copy to mailing address on tax return or sent via secured email.

**Hamilton Financial ® WILL NOT fax completed tax returns.*

5. Security

- Hamilton Financial ® will take every precaution to safeguard clients' information and prevent identity theft.

6. Client Responsibilities

- Hamilton Financial ® is not responsible for tax returns completed without all required documentation. It is solely the client's responsibility to ensure all necessary tax documentation has been received by Hamilton Financial ® in order to proceed with tax preparation services.

7. Payment of Services Render

Payment is due in full for services rendered on all completed tax returns; regardless of if client receives a refund or owes a tax debt to the IRS. **Payment for services rendered may be deducted from taxpayers' refund.** Payment is due in full at the completion of services rendered; after all documents have been received by the taxpayer, and return has been completed.

- If client owes a debt to the IRS, client agrees fee will be paid upfront before tax preparer transmits taxes to the IRS
  - Administrative Fee $75.00
  - State Tax Return Fee $125.00 (if applicable)
  - E-File IRS Extension Fee $175
  - IRS 1040X Amended Tax Return *start at* $275.00

NOTE: In the event a tax return has been completed and a client discovers they did not submit all tax documents, there is a $125.00 fee to make necessary changes to completed tax return. In the event a client makes this discovery after a tax return has been e-filed, accepted and approved by the IRS, an Amended Tax Return must be completed and Amended Tax Return fee must be collected prior to submitting Amended Tax Return to the IRS. pay upfrontor pay from refund (if a refund is expected)

2024 Tax Preparer Fee

pay upfront or from refund (if a refund is expected

E- Sign Authorization $ 101. 95 Administrative Fee $ 75. 00 Refund Transfer Fee $ 51. 95 Pay from refund

Hamilton Financial ® Preparer Fee Simple Plan	$275.00 no dependents | [will be] a dependent of someone else
Hamilton Financial ® Preparer Fee Standard Plan	$375.00 - no dependents
Hamilton Financial ® Preparer Fee Expert Plan	$575.00 - included dependents
Hamilton Financial ® Preparer Fee Business Plan	$775.00 - Sole Proprietor | Single Member LLC
Hamilton Financial ® Preparer Fee Enterprise Plan	$1075.00 (C-Corp, S-Corp, Partnerships, Form 1120S)

By signing below, you acknowledge you have read this agreement and agree to the terms and conditions set forth above.

Taxpayer Signature: ______________________ **Date** ____________

Taxpayer Name: ______________________

Spouse Signature: ______________________ **Date** ____________