

2023 Tax Preparation Service Agreement

Thank you for choosing Hamilton Financial[®]

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

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.

- Taxpayer 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 have been received by Hamilton Financial[®] in order to proceed with tax preparation services.



Hamilton Financial
TAXES

7. Payment of Services Render

- Payment is due in full for services rendered on all completed tax returns; regardless 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
- Fee Breakdown below (*additional W2s or 1099s wage and/or income statements -subject to additional fee of \$50*)
- Additional dependents *may be* subject to additional fee of \$50 (additional required documents)
- Document Fee - Billed - on all Tax Returns - \$75.00
- **State Tax Return Fee (if applicable) \$125.00** add-on fee to Federal Tax Return

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.

2023 FEE pay upfront or pay from refund (*if a refund is expected*)

Preparer FEE	Transmission FEE	Document FEE	Refund TRANSFER FEE <i>optional fee</i>
SEE BELOW	\$68.95	\$75.00	\$39.95 <i>Pay preparer fee out of expected refund</i>

pay upfront or from refund (if a refund is expected)

- ❖ Hamilton Financial ® Preparer Fee **Simple Plan** **\$275.00** up to (4) four W2(s) and/or 1099(s)- no dependent(s)
- ❖ Hamilton Financial ® Preparer Fee **Standard Plan** **\$375.00** up to (5) five W2(s) and/or 1099(s) - no dependent(s)
- ❖ Hamilton Financial ® Preparer Fee **Expert Plan** **\$575.00** up to (5) five W2(s) and/or 1099(s) - dependent(s) included
- ❖ Hamilton Financial ® Preparer Fee **Business Plan** **\$775.00** up to (5) five W2 and/or 1099s (Sole Proprietor or Single Member LLC)
- ❖ Hamilton Financial ® Preparer Fee **Enterprise Plan** **\$1075.00** (C-Corp, S-Corp, Multi Member LLC, Partnerships, Form 1120S)
- ❖ State Tax Filing Fee \$125.00 add-on fee to Federal Tax Return
- ❖ IRS Extension Fee \$175
- ❖ IRS 1040X Amended Tax Return start at \$275.00
- ❖ IRS Authorized E-file Provider
- ❖ Check Print - pick up in-office or mailbox / Prepaid Debit Card /or Direct Deposit is available (*if a refund is expected*)
- ❖ IRS Audit Protection and ID Theft Restoration and Tax Preparer Protection are included in Hamilton Financial ® Preparer Fee



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

_____ Date _____
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 _____ Date _____
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