

# Our Agreement for Tax Prep Services

**Last Updated: September 5, 2025**

Hey there! Before we dive into your taxes, please take a moment to read over these terms. Think of it as our game plan for working together. These terms apply to all of my clients.

By hiring me, you're agreeing to this game plan. If something doesn't sit right with you, let's chat before we get started!

## 1. What I'll Do For You

I will prepare your federal, state, and local income tax returns for the year based on the info and documents you give me. My services include:

- Getting your tax returns put together.
- Figuring out your tax bill or refund.
- Filing the returns for you, but only after you give me your signed approval!

Just so we're clear, this service doesn't cover things like representing you in an audit, bookkeeping, or financial planning. If you need help with those, we can absolutely talk about setting up a separate agreement. At the end of the day, you, the taxpayer, are the one responsible for making sure everything on your return is accurate.

## 2. What I Need From You

To help me get your taxes done right and on time, I'll need you to:

- Get me all your important financial documents—W-2s, 1099s, receipts, bank statements, and anything else needed to do your taxes.
- Make sure all the information you give me is true, accurate, and complete. I'll trust the numbers you provide, though I might ask for clarification if something seems unclear.
- Give your finished tax return a good look-over for accuracy before you sign off on it.
- Let me know about any big life changes that could affect your taxes (getting married, a new baby, a move, etc.).
- Keep your own records and documents to back up everything on your tax return, just like the law requires.
- Take care of the final payment for my services before I file your return.

## 3. My Promise to You

Here's what you can expect from me:

- I'll prepare your taxes using the information you've provided and in line with all the current tax laws.
- I'll handle your taxes with professional care and expertise.
- I'll keep you in the loop on how your return is coming along.
- I'll be here to answer your questions about your taxes.
- I'll keep all your personal and financial info strictly confidential. Your privacy is a top priority!

## **4. Fees and Payment**

My fee depends on how complex your tax situation is. I'll give you an estimate upfront before I start. Just a heads-up, that estimate might change if we discover your return is more complicated than it first appeared.

Payment is due once your return is all ready and before I file it. I'm happy to accept cash, check, credit card, Zelle, and Venmo. Late payments might have interest charges added.

## **5. Your Privacy and Data**

I'm serious about protecting your privacy. I will never share any of your personal or financial info with anyone unless you say it's okay, or unless the law requires it. I have secure systems in place to keep your information safe.

## **6. The Fine Print (Disclaimers)**

To put it simply, I prepare your return based on the numbers and documents you give me. If any info is incorrect or missing, I can't be held responsible for any penalties, interest, or extra taxes that might pop up.

If there's ever an issue with my work, my liability is limited to the fee you paid me for that specific service. I won't be responsible for any indirect or unexpected damages.

Also, if a tax authority questions a deduction and you can't provide the paperwork to back it up, I can't be held responsible for that.

## **7. Ending Our Service**

You can decide to stop working with me at any time—just send me a written notice. If you do, you'll need to pay for the work I've already done.

On my end, I reserve the right to end our agreement if information is misrepresented, you don't provide what I need to do my job, or if payments are late.

## **8. Handling Disagreements**

We'll follow the laws of the State of California. If we ever have a disagreement that we can't solve just by chatting, we'll try mediation first. If that doesn't work, we'll use binding arbitration here in Manteca, California, to sort things out.

## **9. E-Signatures & Emails**

To make things easier, you agree to use electronic signatures for your tax forms and to get communications from me by email. Just make sure I always have your current email address on file!

## **10. Future Changes to These Terms**

Every now and then, I might need to update these terms. If it's a big change, I promise to give you a heads-up at least 30 days in advance. I'll be the one to decide what counts as a "big change."

## **11. Let's Talk!**

Got any questions about this stuff? Please don't hesitate to reach out!

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