



Tax Preparation Services *Agreement*

1. Client Information and Filing Intake

This Tax Preparation Services Agreement (“Agreement”) is entered into by the undersigned individual or business entity (“Client”) _____ and the contracted Tax Company (“Preparer”) **Legacy Forever LLC d/b/a Legacy Forever Tax and Financial Services** for the delivery of tax preparation services for the applicable tax year. The Client affirms that all information provided below is accurate and complete as of the date of signing.

Full Legal Name (Individual or Entity): _____

Filing Type: Individual Joint Head of Household Business Entity (LLC, S-Corp, C-Corp)

Social Security Number or EIN (last 4 digits): _____

Date of Birth (if individual): _____

Business Name (if applicable): _____

State of Business Registration: _____ **Year Formed:** _____

Mailing Address:

Street: _____

City: _____ **State:** _____ **Zip:** _____

Primary Contact Name (if different): _____

Phone: _____ **Email:** _____

Preferred Method of Communication:

Email Phone Secure client portal Text (non-confidential only)

Tax Year to Be Filed Under This Agreement: _____

Deadline for Submission of Documents (agreed upon): _____

Legacy Forever Tax and Financial Services

Phone: 301-300-3617; Email: taxes@legacyforeverllc.com; Website: www.legacyforeverllc.com

The Client agrees to notify the Preparer of any changes to contact information, entity status, or filing circumstances within five (5) business days.

2. Scope of Services and Filing Details

The services provided under this Agreement are limited to the filing year indicated above unless otherwise agreed upon in writing. Please complete the fields below to define the services to be performed.

Services Requested (check all that apply):

- Preparation and electronic filing of federal return
- Preparation and filing of state return(s)
- Preparation of prior year(s) return(s)
- Extension filing (Form 4868 or applicable entity form)
- Amended return (Form 1040-X or equivalent)
- Schedule C (sole proprietor/self-employed)
- Schedule E (rental or pass-through income)
- S-Corp or partnership business return
- Quarterly estimated tax payment planning
- IRS/State correspondence or audit response
- Tax planning consultation outside of filing
- Other: _____

Type of Filing Entity (if business):

- Sole Proprietor/Single Member LLC LLC S-Corp C-Corp Partnership Nonprofit

States to Be Filed (if applicable): _____

Are bookkeeping records being provided? Yes No

Any additional tasks or service extensions beyond those selected above will require a separate written agreement or addendum.

3. Client Data Sources, Document Delivery, and Access Preferences

This section is designed to capture how the Client will submit data, what platforms or systems are in use, and any relevant information needed to ensure complete and timely filing. The Client agrees to provide all required materials in a timely manner and understands that delays in submission may result in delayed filing or the need for an extension.

Document Access and Delivery Preferences:

- All documents will be uploaded to Company's provided secure portal
- Documents will be delivered via encrypted email

Documents will be scanned and sent by email (not recommended)

Other (please specify): _____

Client's Primary Accounting System (if any):

QuickBooks Online

QuickBooks Desktop

Wave

Xero

Excel spreadsheet(s)

Paper records only

Other: _____

All data received will be handled in accordance with applicable IRS privacy rules. The Client agrees not to share sensitive documents over unsecured channels and to maintain responsibility for original source documents.

4. Client Responsibilities and Required Documentation

To enable accurate and timely tax preparation, the Client is responsible for submitting all relevant records, financial statements, and supporting materials in a complete and organized format. The Preparer is not responsible for locating, verifying, or supplementing missing data unless otherwise agreed in writing.

The Client agrees to the following obligations:

- Submit all required tax documents (W-2s, 1099s, K-1s, expense logs, receipts, and prior-year returns) by the agreed deadline
- Provide accurate and truthful information regarding income, deductions, dependents, assets, liabilities, and entity structure
- Disclose all reportable foreign accounts, cryptocurrency transactions, and third-party payments as required by law
- Maintain original documents and records used to substantiate entries on the return
- Respond promptly to follow-up requests or clarification needs from the Preparer to avoid filing delays
- Inform the Preparer of any IRS or state correspondence related to returns prepared under this Agreement
- Acknowledge that failure to fulfill these responsibilities may result in filing errors, rejected returns, or delayed processing beyond the Preparer's control

If any documents are missing, illegible, or inconsistent, the Preparer reserves the right to pause services, request clarification, or decline to complete the filing until proper documentation is received.

5. Independent Status and Non-Liability for Tax Positions

The Preparer is engaged as an independent professional and does not act as the Client's legal counsel, financial advisor, or IRS representative unless expressly agreed to in writing under a separate engagement. All tax positions taken in the prepared return are based exclusively on information and representations provided by the Client. The Preparer is not responsible for the consequences of nondisclosure, misrepresentation, omission, or incomplete information provided by the Client.

The Preparer does not guarantee eligibility for deductions, credits, tax refunds, or audit clearance. All filings are made in good faith based on reasonable interpretation of applicable tax law and the facts as presented. The Client accepts full legal responsibility for all tax liabilities, interest, or penalties resulting from the information included in their return. The Preparer shall not be held liable for any errors or adverse outcomes that arise due to IRS rule changes, processing errors, or limitations in information provided by the Client. In the event of an IRS or state examination, the Client is solely responsible for providing source documentation and resolving disputes unless audit support is separately contracted.

6. Tax Preparation Workflow and Timeline Overview

The following table outlines the standard workflow for return preparation under this Agreement, including responsibility for each stage and estimated turnaround times. These timeframes are dependent on complete documentation being submitted by the Client and may be extended if additional complexity or clarification is required.

Stage	Responsible Party	Standard Timeline	Notes
Initial document intake	Client	On or before agreed deadline	Late submissions may require filing an extension
Review of records and setup	Preparer	Within 3–5 business days of receipt	Additional requests may be sent if documents are unclear
Draft return preparation	Preparer	Within 7 business days after full intake	Timeline may extend based on complexity or entity type
Review and approval by Client	Client	Within 2 business days of draft delivery	Delayed approval may result in missed filing deadlines
Return finalization and e-filing	Preparer	Within 2 business days of client approval	Confirmation will be provided once filing is accepted
Client receives copy of return	Preparer	Within 1 business day of final submission	Delivered via client portal, encrypted email, or hard copy

This workflow may be adjusted to accommodate expedited filing, multi-year returns, or business entity structures requiring advanced compliance review. Any deviation from standard deadlines must be agreed upon in writing.

7. Accuracy of Information and Return Authorization

The Client affirms that all financial data, income figures, deduction claims, and identification details provided to the Preparer are complete and accurate to the best of their knowledge. The Preparer will not audit or verify the information submitted and will rely on the Client's representations when completing each return. The Client is solely responsible for maintaining all source documentation used to substantiate each line item on their return, including receipts, invoices, statements, and relevant legal or financial records.

Upon receipt of the draft return, the Client is required to thoroughly review the contents and confirm that all information appears correct. Approval of the final return must be provided in writing before any documents are submitted to the IRS or state taxing authorities. Once authorization is granted and filing is completed, any subsequent changes, corrections, or amendments will be treated as a new engagement and may be subject to additional fees. The Preparer will not be liable for any omissions, reporting errors, or inaccuracies resulting from the Client's failure to disclose complete information during the preparation process.

8. Confidentiality and Data Security Protocols

The Preparer agrees to maintain full confidentiality with respect to all personal, business, and financial information provided by the Client. This includes any documentation or statements related to income, expenses, assets, liabilities, identification numbers, or tax history. The Client's data will not be shared with third parties except where legally required or explicitly authorized in writing.

The following standards apply to all data submitted under this Agreement:

- All digital records will be stored securely using encrypted systems or password-protected platforms
- Only authorized individuals working directly on the Client's file will have access to submitted materials
- Paper records will be secured during preparation and shredded upon final delivery or completion
- The Client must not send sensitive documents over unsecured email unless specifically agreed upon
- The Preparer is not liable for breaches or data loss caused by third-party platforms or email providers
- If a data request is made by the IRS or state authority, the Client will be notified unless prohibited by law

This confidentiality clause remains in effect both during the engagement and after termination of services.

9. Fees, Payment Terms, and Refund Policy

The Client agrees to pay the fees associated with services rendered under this Agreement in accordance with the pricing structure provided at the time of engagement. Unless a flat fee has been agreed upon in writing, all services will be billed based on the complexity of the return, the number of forms required, and the time involved in preparation. If you agree and decide to

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continue with our services, then a **Non-Refundable \$100 retainer is required**. Additional fees may apply for amended returns, extension filings, multi-year engagements, or complex business schedules. Any anticipated fee increases or scope changes will be communicated prior to invoicing.

Payment is due in full upon delivery of the completed return and before electronic filing or physical submission to tax authorities. Invoices may be paid via credit card, bank transfer, or other accepted methods provided by the Preparer. If payment is not received within the agreed timeframe, the Preparer reserves the right to withhold filing or release of the return until payment is resolved. All fees are non-refundable once work has commenced, regardless of whether the Client proceeds with filing or chooses to delay or withdraw. The Client agrees not to initiate chargebacks or payment reversals through their financial institution, and any disputed payments must be resolved through direct communication and written documentation.

10. Amendments, Additional Work, and Scope Adjustments

While this Agreement outlines the services selected at the outset of engagement, certain situations may require adjustments or extensions beyond the original scope. These may include tax notices, late-arriving documents, amended filings, or unanticipated complexity in the return.

The Client agrees to the following terms regarding scope changes:

- Any additional services must be documented in writing and confirmed before work begins
- Expanded services may include amended returns, multi-year filing, extension support, or audit response
- Adjusted fees will apply to all additional work and will be communicated before billing
- Timeline extensions may be required depending on the complexity of added services
- Verbal requests or casual communications will not override the terms of this written Agreement
- The Preparer reserves the right to decline additional services that exceed available capacity or licensing scope

All amendments will be integrated through written addenda or separate service authorizations signed by both parties.

11. Legal Compliance and Limitations of Engagement

The Preparer agrees to comply with all applicable IRS regulations, Circular 230 standards, and state-level tax preparation laws. This Agreement does not authorize the Preparer to act as a legal representative or perform services outside the statutory limits of non-attorney tax professionals. The Client understands that this engagement is limited solely to the preparation and submission of tax documents as specified and does not include audit defence, legal filings, or litigation services unless separately contracted.

In the event that complex or disputed matters arise during preparation, the Preparer may recommend that the Client consult a tax attorney, enrolled agent, or financial advisor. The Client is responsible for taking independent legal or financial action where necessary and agrees that the Preparer shall not be held liable for any consequences of failure to obtain such

advice. This limitation remains effective throughout the duration of the engagement and applies to all services performed under this Agreement.

12. Governing Terms and Dispute Resolution

This Agreement shall be governed by the laws of the state in which the Preparer is legally registered to perform tax services. Any disputes arising out of or related to this Agreement shall first be addressed through good faith negotiation between the parties. If no resolution is reached, the parties agree to submit the dispute to non-binding mediation prior to pursuing any formal legal action. Each party will bear their own legal costs unless otherwise determined by a court of competent jurisdiction.

This Agreement may not be transferred, assigned, or sublicensed by the Client without prior written consent of the Preparer. If any clause within this Agreement is found to be unenforceable or invalid, the remainder of the document shall remain in full effect. All rights, obligations, disclaimers, and limitations outlined herein shall survive termination of the Agreement to the extent required by law.

13. Acknowledgment and Signature

By signing below, the Client and Preparer confirm that they have read, understood, and voluntarily agreed to the terms outlined in this Agreement. The Client affirms that all information provided for tax preparation is accurate and complete. The Preparer affirms that they will perform the services outlined to the best of their professional ability within the scope of this engagement. Both parties acknowledge this document as a binding agreement effective as of the final date of execution.

Client Name: _____

Signature: _____ **Date:** _____

Preparer Name: _____

Signature: _____ **Date:** _____