



Tasha's Taxes

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PROFESSIONAL SERVICES AGREEMENT

This AGREEMENT is made on _____(day) of (month) _____, 20_____(year), in San Antonio, Texas, for the services being provided for (Client's Full Name) _____, (and Spouse if applicable) referred to as "Client(s)", and the Tax Firm of Tasha's Total Tax Service, LLC DBA: Tasha's Taxes a limited liability company, whose principal office is located in San Antonio, Texas, hereinafter referred to as "Tasha's Taxes" or "Office" or "Firm" as follows:

HIRING OF TASHA'S TAXES FOR ONE OR MULTIPLE SERVICES

1.0 In consideration of the mutual promises as hereinafter more specifically set out, Tasha's Taxes does hereby agree to work diligently for the Client(s), _____, individually, (or spouse if applicable) and the Client does hereby retain Tasha's Taxes to prepare, file, report, review, investigate(if required), research for accuracy, speak to the Internal Revenue Service as a third party representative, reply and report any and all information in the case of audit or further review from the Internal Revenue Service(IRS) comply with all rules; regulations; and laws that are required according to all due diligence requirements to ensure compliancy is being conducted to the best of Tasha's Taxes ability and knowledge of all said compliances set forth by the Federal, State, County, and local government. Said Services shall include meeting all due diligence compliance according to the tax filing year that is being serviced at the time of hire. This service is to also to include effective communication with the client (spouse if applicable), the IRS and any local, federal, or state governing agency requesting any reporting information or compliance data i.e. the attorney general office for back child support, the health and human services office where the client is expected to pay in past due funds via from their own personal wages and income or the garnishment of any expected tax refund due to the client shall be required and handle accordingly.

PURPOSES AND SCOPE OF HIRING

2.0 While it is recognized by the Client and Tasha's Taxes that in the course of carrying out its representation of the Client as contemplated by this AGREEMENT, Tasha's Taxes may be called upon to, of necessity, perform tasks which were not necessarily originally contemplated by the parties to this AGREEMENT, it is nonetheless specifically agreed and understood that the scope of the employment by the Client shall be governed by this AGREEMENT and shall be limited to the matter referred to in Paragraph 1.0 above, and only to such matters and to the carrying out of any matter(s) which, of necessity, requires Tasha's Taxes to adequately perform the legal services contemplated by this AGREEMENT. Nothing herein contained shall serve to expand or enlarge the scope of the matters for which Tasha's Taxes has been employed, nor Tasha's Taxes professional responsibility to the Client, and the scope and responsibilities of the parties one to the other shall at all times be so limited unless this AGREEMENT is amended or modified in writing and signed by the Client and Tasha's Taxes. Tasha's Taxes will not be responsible for any civil representation.

2.1 The Client hereby acknowledges that Tasha's Taxes has made no guarantees regarding the successful outcome of this matter and all expressions about the outcome are only opinions based on passed dealings, learned information, facts study, information gathered or researched based on the current tax laws or applicable tax laws.

2.2 However, Tasha's Taxes does promise, warrant and agree to provide its best professional efforts, and expertise on behalf of Client(s) (Full Name) _____, its Client, Nathasha Banks will serve as said preparer, on behalf of Tasha's Taxes, working in the said matter described in Paragraph 1.0 above.

Tasha's Taxes

3.0 The Client _____ **will not be charge any upfront fees for services provided by Tasha's Taxes,** but hereby agrees to pay Tasha's Taxes understanding the duties and responsibilities hence set forth to include any additional research, training, education, or resources that were required to obtain the proper dedication needed to work for you the client. The Tax Preparer with whom the Client is contracting services with is Nathasha Banks, owner and operator of Tasha's Taxes. An hourly fee is permitted by the Internal Revenue Service, the software provider and the financial service provider for Tasha's Taxes. The hourly fee is optional for the preparer and may only be used at Tasha's Taxes when the service being provided to you (the client) requires more than acceptable allotted amount of time, otherwise the client will not be charged an hourly rate, but fees based on the following criteria listed below.

- (1) The time and labor required, the novelty and difficulty of the work involved, and the skill requisite required to perform the legal service properly.

- (2) The fee customarily charged services at Tasha's Taxes are similar to legal/professional services. Establishing the correct data required to set a business plan when starting a new/acquiring a new business/becoming a shareholder in already established company(s)
- (3) Obtaining all legal information for farmers, ministers, nonprofit organizations/charities, homestead, first time home buyer repayment program, reporting stock, reporting CD's, ROTH, Retirement Plans, IRAs, 1099s, health saving plans, qualifying education plans, real estate taxes, property taxes, personal taxes, establishing an educational center, establishing a restaurant, hair salon etc.
- (4) The time limitations imposed by the Client or by the circumstances.
- (5) The experience, education and training gained/require that helps to increase the knowledge and abilities of the tax preparer performing the services.
- (6) Forms required to accurately reflect/report your tax return data to the IRS/State/Local/Federal government, entity, or tax accessors office.

EXPENSES

4.0 The Client will be given the option to pay all form filing fees, tax preparation fees, transmitter fees, preparer fees, and any banking fees out of income tax refund. As Tasha's Taxes financial tax banking service provider offers ZERO upfront fees or cost, this information is displayed and readily available as it offers other financial banking products. The client has the right to decline the use income tax refund to pay for services, if this is the case than the client may pay for services received from Tasha's Taxes prior to the submission of income tax return to IRS.

- If the client is not due a refund, then all fees incurred from services furnished to the client are required to be paid by the client prior to the submission of income tax return being furnished to the IRS for processing.
- If the client is financially destitute, then the client(s) **may apply for a waiver of fees for services administer by Tasha's Taxes**, in the event that the client does not meet the qualifications for a waiver than the client and Tasha's Taxes can enter into a reasonable agreement that allows the client to setup a payment plan to be invoiced to the client and paid off in a reasonable amount of time established by Tasha's Taxes.
 - This information will also be furnished and maintained on file until the final payment has been paid, thus satisfying payment of services.
 - If a payment plan is established the client will be kept informed of any remaining balance, if client is using refund to pay for services Tasha's Taxes will ensure this information is reflected via banking services provided through company software.

- If the client's income tax refund **has not** been released from the IRS within a reasonable amount of time after submission, then the client will be sent an invoice for request of payment.
 - This request will be sent out from the financial provider of Tasha's Taxes, the request for payment will be sent out to the client 3 times, if the client has not submitted payment for the requested fees due, then the financial services provider for Tasha's Taxes will attempt to collect payment for services render by Tasha's Taxes **via the financial banking information listed on the clients reporting income tax return.**
 - If the client has received this notice and cannot pay for services at the time, **the client can request for Tasha's Taxes to suspend collection attempt, this request must be made within a timely matter,** giving Tasha's Taxes adequate time to inform the banking software not to collect payment.
 - If the client does not inform Tasha's Taxes of their inability to pay due to financial hardship or any other concern, **Tasha's Taxes will not be able to stop the payment, nor will she be able to assist in providing a refund of any kind.** It is the client's responsibility to inform Tasha's Taxes of any situation financial or otherwise.

COOPERATION OF THE CLIENT

5.0 The Client agrees to provide all tax forms, tax transcripts, and any other documents to assist the preparer in reporting tax filings, tax amendments, prior year tax filing, or ITIN request assistances that are needed for the preparation, service or work. The client agrees to comply with all reasonable requests of Tasha's Taxes in connection with due diligence compliance, the preparation of the tax filing, letter of claims, defense against of any penalties the IRS has placed upon the client (or spouse, if applicable), or causes of action of the Client.

TEXAS LAW TO APPLY

6.0 This AGREEMENT shall be construed under and in accordance with the laws of the State of Texas, the Internal Revenue Service, to include federal and local government laws (i.e., state tax filing, corporate tax filing, etc.) any and all obligations of the parties created hereunder are performable in Bexar County, Texas.

PARTIES BOUND

7.0 This AGREEMENT shall be binding upon and inure to the benefit of the parties hereto and their respective heirs, executors, administrators, legal representatives, successors, and assigns where permitted by this AGREEMENT.

APPROVAL OBTAINED

8.0 Prior to receiving this Personal Service Agreement the Client _____ (spouse if applicable) has received and signed **A Letter of Engagement** initiating the clients request of services from Tasha’s Taxes. Each of the parties do hereby understand that all information obtained is sensitive and private, as this is such all data and conversation will be treated with the upmost confidentiality and will be handled as such. After reading, reviewing, and signing the **LETTER OF ENGAGEMENT** and the **PERSONAL SERVICE AGREEMENT** the client will receive an **Items Needed List**, this is being furnished as a guideline as to what information is required for Tasha’s Taxes to work for the client, this does not mean that just because an item is not listed that it should not be furnished to Tasha’s Taxes. Omitting any mandatory reporting information from Tasha’s Taxes, prior to the submission of your income tax return or requested supporting information to the federal, state or local government can result in the client incurring additional fees and penalties from the authorized governing agency. As this is, it is best to furnish all documentation to Tasha’s Taxes even if it is not listed on the **Items Needed List**. This document serves to represent and warrant to the other that they have obtained all requisite and necessary approval of any governmental or quasi-governmental agency or representatives in connection with the execution of this AGREEMENT, and that all parties have legal capacity and authority to execute this AGREEMENT and to bind themselves thereto.

LEGAL CONSTRUCTION

9.0 In the event any one or more of the provisions contained in this AGREEMENT shall for any reason, be held to be invalid, illegal, or unenforceable in any respect, such invalidity, illegality, or unenforceability shall not affect any other provision thereof and this AGREEMENT shall be construed as if such illegal, invalid, or unenforceable provision had never been contained therein.

PRIOR AGREEMENTS SUPERSEDED

10.0 This AGREEMENT constitutes the sole and only agreement of the parties hereto and supersedes any prior understandings or written or oral agreements between the parties respecting the within subject matter.

AUTHORIZATION OF PREPARER

11.0 Tasha’s Taxes is hereby authorized to obtain all information and reports, all information incident thereto, including but not limited to information reports related to examinations, communications passing by and between reporting agents, employees or representatives of the Client, any and all confidential files of the Client, that has been reported/furnished to the IRS, State/County tax assessors/comptroller office or any other matters concerning the subject matter of this AGREEMENT. Tasha’s Taxes is also authorized to obtain all other information or reports relative to the subject matter of this AGREEMENT, including but not limited to any governmental or quasi-governmental investigative reports or letters received from the IRS; Federal or local government agency, wage and income statement, accounting statements, banking/financial statements, virtual currency, stocks, bonds, cancellation of debt form, foreign taxable/nontaxable income, lottery winnings, unemployment earnings, ministry

earnings, gifts, estate, third party reporting income from sales on Amazon, Etsy, and other evidentiary materials regarding furnishing an accurate tax return report.

In the Case of

12.0 The Client and Tasha's Taxes agree that any and all pertinent information that is being requested from any federal, state, local governing agency will be submitted to Tasha's Taxes prior to filing any reporting data, this will help to ensure compliance laws are being met. In the case of any reporting data that needs to be submitted for further review or for further clarification or requires additional supporting evidence rather the requesting party is the Internal Revenue Service, State Comptroller Tax Office, or other authorized government agency, all pertinent information will already be on hand and readily available to furnish to the requesting authorized party. As with all sensitive data, information, documents, forms, financial statements or any confidential information all information will be treated with the highest level of sensitivity to ensure that the client's data is safeguarded against any attempt to gain unauthorized information to any one person or entity. No information will be shared with any one or unauthorized entity regardless of relationship held with the client that is currently being serviced and care for by Tasha's Taxes. Both the Client and Tasha's Taxes preparers signature hereby agree that all information furnished to Tasha's Taxes is/was obtained legally and that there has been no attempt to knowingly/unknowingly attempt to defraud any part of the Internal Revenue Service or its governing agency. As this is a legal document that will be placed and kept in the clients file for a minimum of 36 months after the original signature date and that if the client seeks any additional services from Tasha's Taxes a new Personal Service Agreement will be established and signed thus keeping all key requirements in compliance with that current/or filing year laws, rules and regulation. As this is a legal document, the client and (spouse if applicable) signature state the client has read, acknowledge and understands that they are in agreement in what is required from both (all) parties involve and shall be binding, conclusive and non-appealable. The client(s) will be furnished with a copy of this Personal Service Agreement for their personal records.

THIS PROFESSIONAL SERVICE AGREEMENT WAS EXECUTED ON THE DAY, MONTH AND YEAR FIRST WRITTEN ABOVE BUT SHALL NOT BECOME EFFECTIVE UNTIL SIGNED BY ALL PARTIES.

CLIENT: _____
Full Name

CLIENT: _____ DATE: _____
Signature

SPOUSE (IF APPLICABLE): _____
Full Name

SPOUSE: _____ DATE: _____
Signature

Tasha's Taxes

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(210) 274-4919 Office phone

(210) 334-8391 Appointment Line

Preparers Name

Date

Preparers Signature

(SEAL)