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**2025 Tax Advisory Service Agreement**

**Individual or Business Tax Advisory Service Agreement**

This Service Agreement is to inform you, the client, that our Individual or business tax advisory services will use the most recent information available. In completing this work, we take notes on the subject matter, the IRS policies and procedures, Internal Revenue Code, Internal Revenue Publications and IRS Bulletins on current tax changes proposed. This agreement covers state tax authority issues, US Treasury Department, Tax Treaties, and current guidance from other sources which we will provide you in our case report.

**Tax Advisory Case Process**

* We will write up each scenario in detail with all known facts and circumstances to start the process. This involves the start date, expected completion date, persons or businesses involved and receipt of any supporting documentation for the case at hand.
* Application of Internal Revenue Service or State Laws and procedures, Internal Revenue Code, or Internal Revenue Service Publications will be done in all cases involving IRS or state individual or business tax situations.
* References will be provided relating to the topic at hand from all sources we use in completing this work.
* Invoices for tax advisory services will be due on NET-7 Payment Terms upon completion of work.
* The tax advisory service fees can be paid by check, stripe, Venmo, Paypal, Cashapp or Zelle.
* **Tax Advisory Service Fees paid are nonrefundable and will not be applied to other services we offer.**
	+ **Request your initials in the box accepting this agreement:**
* **As the Tax Advisory Service Agreement is signed by all parties, a $79 Retainer will be due to begin work and is applied as a Credit toward the first invoice fees due.**
* A copy of each tax advisory case will be maintained on file using the client’s number.

**Signatures.** By signing below, you acknowledge that you have read, understood, and accepted your obligations and responsibilities and that you understand our responsibilities in providing tax advisory services as explained above.

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Individual / Business Owner (Printed Name) Signature Date

Mobile Tax Associates Representative Date