**THE ESSIX GROUP**

**IRS Registered & Recognize**

**Professional Income Tax Preparation**

2536 Mangum Street Commerce, TX 75428 Ph. 903.886.2016 Fax 903.246.3135

INITIAL CONSULTATION AGREEMENT

We are grateful for the opportunity to consult with you regarding your Federal Income Tax needs. We hope you will find the meeting to be both beneficial and enlightening.

In your initial consultation, we will identify the type of Federal Tax Return required, the key issues, and the options you may have with the IRS under the law. We will discuss whether The Essix Group should prepare or represent you with your Federal Tax issues, what that representation could involve, and what processes will be involved and required.

**No Fee will be charged for an initial consultation**. However, if you decide at the end of the initial consultation that you would like to retain The Essix Group for tax preparation and/or representation but later decide to cancel the processing, **you will be charged a fee of $100.00 for tax advice and the preparation expense** of preparing your Federal Income Tax Return. This fee does not exceed one hour and you may pay in cash, check, or credit card. Your payment is due in full at the time of cancellation and prior to returning your W-2’s and other tax documents.

At the conclusion of your initial consultation but prior to the processing of your Federal Income Tax Return, a processor can provide you with this contract of services, including an outline of fees and costs, information sheets, and other pertinent information. If you or the processor fails to sign the contract for services, the preparer-client relationship between you and The Essix Group will not extend beyond the initial free consultation. Any communications you make to the processor or The Essix Group Representative during the initial consultation are confidential and protected by client privilege to the extent of IRS Laws and Regulations.

Thank you for giving us the opportunity to consult with you regarding your taxes.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Your Signature Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Your Printed Name Best Number for Contact

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Essix Group Rep Signature Date