



## INCOME TAX RETURN PREPARATION AGREEMENT

We appreciate the opportunity of working with you in completing your federal and state income tax returns.

To ensure an understanding of our mutual responsibilities, we ask all our clients to confirm the following agreements. Please read all the information and ask questions if you are unclear about anything before signing this document.

- **Tax Return preparation:** Returns will be prepared based on the information that you provide us. Your tax returns may be selected for review for any reason by the taxing authorities, and any proposed adjustments by the examining agent are subject to certain rights of appeal. In the case that your tax return is selected for review, you must forward all correspondence you receive to us for review & analysis. Please keep in mind we can only assist you if you contact us, otherwise we will not be aware of the audit being conducted. These services ARE NOT included in your tax preparation fee, therefore render additional fees for the time and expense incurred on a case-by-case basis, also additional fees may be charged depending upon the type of response required. Unfortunately, Bay Area Tax Return Preparers cannot represent you before any tax court or authority, you will have to hire a Tax Attorney or represent yourself. The Internal Revenue Service (IRS) and the State of California (FTB) provide various penalties that may be imposed when taxpayers understate their tax liability.
- **Dependent Verification:** I/We declare that I/we have proof that my/our dependents live with me/us, and I/we shall have them ready for the IRS or FTB in case of an audit. Furthermore, I/we understand that it is the taxpayer's final responsibility for the income tax returns; therefore, the income tax return will be reviewed carefully before signing.
- **Electronic filing:** All Income Tax returns filed by Bay Area Tax Return Preparers will be submitted to the IRS and State using the EFILE system whenever appropriate or allowed by government agencies.
- **Refund Delays:** If you encounter any issues with your return (e.g., you did not receive your refund, or your check has not been cashed), do not hesitate to contact us. However, we cannot be held liable if the Department of the Treasury (IRS) or the Franchise Tax Board (State) delays or holds your refund for any reason.
- **Income Tax Return copies:** We will provide you with a copy of your return. Additional Copies will be available for an additional fee for up to 5 years. After 5 years, you might have to contact the taxing authorities for a copy of your return.
- **Our Privacy Policy, Compliance with the Gramm-Leach-Bliley Act, Public Law 106-102 (FTC 16 CFR Part 313)**  
The privacy of our client information has always been important to us, and professional standards of confidentiality have always bound us. However, the law now requires us to formally inform you of our privacy policy. A) We collect nonpublic personal information about you that is provided by you or obtained by us with your authorization. This information may come from various sources, including information we receive from personal interviews, tax organizers, worksheets, and other documents necessary to provide professional services to you. B) We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as permitted or required by law, or when necessary to process transactions requested by a client. C) We restrict access to nonpublic personal information about you to members of our firm who need that information to provide you with professional services. We maintain records relating to the professional services that we provide you following accounting and government standards. D) We employ physical,



# BAY AREA

TAX RETURN PREPARERS

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electronic, and procedural security safeguards to protect your nonpublic personal information. Your confidence and trust are important to us. If you have any questions or concerns regarding the privacy of your nonpublic personal information, please contact us.

- **Customer Pricing Notice:** A 3.99% Customer service charge is applied to all store sales at this location. **Cash/Check/Zelle Discount**, as an incentive for customers paying with Cash/Check/Zelle we now provide an immediate discount of 3.99% on your purchases.
  - Our fees are based upon a standard rate schedule for the type of forms required to be filed. Payment for our services is due before filing your tax forms with the Government agencies.
  - In the case you decide not to Complete your tax filing with us; there will be a charge for the Partial preparation that we provided. The Partial preparation Fee will depend on the time and or forms we used in your specific situation.
  - **Appointment Cancellations: We need 48 hours' notice in case you need to cancel or reschedule your appointment. Otherwise, a missed appointment charge of \$50.00 will be added to your next appointment.**
- **Consent to Electronic Communications:** I expressly consent to receive TEXT/SMS messages and/or email messages, to wireless or similar devices, from Bay Area Tax Return Preparers at telephone numbers and/or email addresses that I have provided. Message and data rates may apply.

☐ **Yes**, I agree to receive text messages from Bay Area Tax Return Preparers at the phone number listed above.  
*Message frequency varies and may include appointment scheduling/confirmation/cancellation reminders. Message and Data rates may apply. Opt out at any time by replying "stop" or "unsubscribe".*

☐ No, I do not want to receive text messages from Bay Area Tax Return Preparers. See our Privacy Policy for details on how we handle your information.

If the foregoing fairly sets forth your understanding, I/we Acknowledge with my/our signature.      **DATE**\_\_\_\_\_

**Printed Name** \_\_\_\_\_ **Spouse Name** \_\_\_\_\_

**Cell Phone Number:** \_\_\_\_\_ **Spouse Cell Phone** \_\_\_\_\_

**Email:** \_\_\_\_\_ **Spouse Email** \_\_\_\_\_

**Signature:** \_\_\_\_\_ **Spouse Signature** \_\_\_\_\_