Terms and Conditions

Last updated: November 2026

1. Agreement to Terms

By accessing and using this website, you accept and agree to be bound by these Terms and Conditions. If you do not agree with any part of these terms, you should not use this website or our services.

2. Services Provided

We provide tax preparation, tax planning, bookkeeping, and related financial services to individuals and businesses. Our services include, but are not limited to:

- Preparation and filing of federal and state tax returns
- Quarterly estimated tax payment planning and reminders
- Tax planning consultations and strategies
- Bookkeeping services
- 1099 preparation and e-filing services
- Business entity filing assistance (LLC, INC, LP)
- Extension filing services

3. Client Responsibilities

As a client, you agree to:

- Provide accurate, complete, and timely information necessary for the preparation of your tax returns and related services
- Complete and return all required worksheets and documentation each tax year, even if you are a returning client, as required by the IRS
- Submit all official tax documents to your designated client dropbox folder in a timely manner
- Respond promptly to bookkeeping questions and requests for information
- Review all prepared returns carefully before signing and filing
- Inform us of any changes in your financial situation, business structure, or contact information
- Meet all deadlines for providing information to allow adequate time for preparation and filing

4. Deadlines and Extensions

While we make every effort to remind clients of important tax deadlines, ultimate responsibility for meeting filing deadlines rests with the client. Key deadlines include:

- Quarterly estimated tax payments: January 15, April 15, June 15, and September 15
- Corporate returns (Forms 1120 and 1065): March 15
- Personal, LLC, and Schedule C returns: April 15
- 1099 filings: January 31

When a deadline falls on a weekend or holiday, the deadline moves to the next business day. If you anticipate being unable to meet a deadline, you must contact us as soon as possible so we can file an extension on your behalf. Failure to file or pay on time may result in penalties and interest assessed by the IRS or state tax authorities, for which we are not responsible.

5. Tax Planning Services

For clients enrolled in our personal/business tax planning service, year-end tax planning adjustments must be completed by December 31 of the current tax year. To ensure we can maximize your tax savings, you must keep your books up to date and respond to all bookkeeping questions in a timely manner. We cannot guarantee specific tax savings outcomes, as results depend on individual circumstances and the accuracy of information provided.

6. Fees and Payment

Fees for our services will be communicated to you before work begins. Payment is due upon completion of services unless other arrangements have been made in writing. We reserve the right to withhold delivery of completed returns or documents until payment is received. Additional fees may apply for amended returns, audit assistance, or services beyond the original scope of work.

7. Confidentiality and Data Security

We take the confidentiality of your financial information seriously. All client information is kept confidential in accordance with applicable laws and professional standards, including IRS Circular 230. We use secure methods for document transfer and storage, including designated client dropbox folders. We will not share your information with third parties except as required by law or as necessary to provide our services.

8. Limitation of Liability

While we strive for accuracy in all our work, our liability is limited to the fees paid for the specific service in question. We are not liable for penalties or interest resulting from

inaccurate or incomplete information provided by the client, or from the client's failure to meet deadlines for providing necessary information or documents. Tax laws change frequently, and while we make every effort to stay current, we cannot guarantee that all information provided will reflect the most recent legislative changes.

9. No Guarantee of Results

Tax planning strategies and advice are based on current tax laws and the information you provide. We cannot guarantee specific tax outcomes, refund amounts, or savings. The IRS and state tax authorities make final determinations on all tax matters.

10. Electronic Communications

By engaging our services, you consent to receive communications from us electronically, including email reminders about tax deadlines, requests for information, and other service-related communications. You agree that electronic signatures and records satisfy any legal requirement that such communications be in writing.

11. Termination of Services

Either party may terminate the service relationship at any time with written notice. Upon termination, you are responsible for payment of all fees for services rendered through the termination date. We will provide you with copies of your documents upon request, subject to payment of any outstanding fees.

12. Changes to These Terms

We reserve the right to modify these Terms and Conditions at any time. Changes will be posted on this page with an updated revision date. Your continued use of our services after changes are posted constitutes acceptance of the modified terms.

13. Governing Law

These Terms and Conditions are governed by and construed in accordance with the laws of the state in which our firm is located, without regard to its conflict of law provisions.

14. Contact Information

If you have any questions about these Terms and Conditions, please contact us. We are happy to clarify any aspect of our services or these terms.

These terms and conditions are effective as of November 2026 and apply to all clients and website visitors.