



Tax Preparation Service Agreement

Thank you for considering Touché Financial Solutions, LLC to provide you excellent tax preparation services for the **2020 tax year.**

We will be preparing tax return(s) for the following tax year(s): _____

Returns completed will be (circle one): **1040 1040ez 1041 1120 1120s 1065 Other:** _____

Total Cost of Service: \$ _____

Deposit Amount: \$ _____

Outlined below is a service agreement between Touché Financial Solutions (tax preparer), and you (client, customer, taxpayer).

1. Touché Financial Solutions will perform the following services:

- Engage you in a brief consultation to assess your current tax situation and determine tax preparation needs
- Complete a federal tax return
- Complete the applicable state return(s);
- Review all documents received and analyze the potential for attaining more deductions and credits;
- Prepare your return to be e-file or mail with the IRS and applicable state;
- Discuss your prepared return with you prior to filing the return, and
- Present a completed analysis and recommendation for the following year to maximize your tax return in the following year

2. Representation:

Should the need arise, on certain situations Touché Financial Solutions, LLC will speak to the IRS on your behalf.

3. Availability

Touché Financial Solutions, LLC will be available from 10am – 6pm Monday – Friday and 8am – 12pm Saturday during the tax season. (January 1st, - April 15th) After the tax season, the hours of availability will resume to normal business hours.

4. Delivery of Completed Tax Return

- Services will NOT begin without a 50% non-refundable deposit
- Completed tax returns (or a copy) will be provided following balance of payment of services rendered
- The Customer may have a copy of the return delivered as a hard copy, via email or placed onto a scandisk. Touché WILL NOT fax completed tax returns.

Touché Financial Solutions, LLC
470 Olde Worthington Rd Suite 200 Westerville, OH 43082

5. Security

Touché Financial Solutions will take every precaution to safeguard clients' information and prevent identity theft.

6. Payment of Services Rendered

- Services will not begin until 50% of tax preparation fee have been paid
- Payment is due in full at the completion of services rendered BEFORE tax returns are submitted to the IRS. Payment for services rendered is due on all completed tax returns whether the client is to receive a refund or not. Final payment may be deducted from clients refund. Client must verify NO offsets are outstanding on account.

7. Client's Responsibilities/Amendments

Touché Financial Solutions, LLC is not responsible for returns completed without all of the necessary documentation.

After the client submits deposits and informs Touché Financial Solutions to proceed with completing the return it is the responsibility of the client to ensure all applicable documentation has been provided to Touché Financial Solutions.

In the event, the Client discovers that they fail to provide all documentation and the tax return has already been completed (before filing), a fee of **\$100.00** will be assessed to make the necessary changes.

If the client's discovery is made following the filing of said tax return an amendment tax return will be required to include the additional information. Amendments are **\$200.00** per return.

By signing the below, you as the client are certifying you acknowledge that you have read and agree to the terms and conditions set forth above. You are also confirming you have provided and disclosed ALL information truthfully, accurately, & complete. In the event, it was discovered you provided fraudulent and/or misrepresented information to Touché Financial Solutions by Touché Financial Solutions or ANY tax reporting agencies, all monies paid will be forfeited, tax preparation services will be discontinued, and you will take full responsibility for any fines, penalties, or other legalities.

Taxpayer (s) Acknowledgement:

_____	_____	_____	_____
Print Name	Date	Print Name	Date
_____		_____	
Signature		Signature	

Tax preparer Acknowledgement:

_____	_____
Print Name	Date

Signature	