



# **TaxSmith**

## **TAX & ACCOUNTING**

### **2017 INCOME TAX CLIENT OVERVIEW**

Thank you for choosing TaxSmith Tax & Accounting to handle your income tax return filing needs! We are happy to serve you! We need some basic information from you that will enable us to get your file started and/or updated, and to also provide you with what to expect from us in completing your tax returns.

#### **WHAT TO EXPECT FROM TAXSMITH TAX & ACCOUNTING**

TaxSmith is a “drop-off” business, meaning we do not prepare your return while you sit and wait. National chain tax preparers that do this are often operating under a high-volume, high price model and prepare every client’s return as quickly as possible, often overlooking items or making mistakes during preparation - and then charge their clients to review their return, provide copies of their returns or help with any notices received from the Internal Revenue Service or state revenue office.

TaxSmith works on client returns on a first-come, first-served basis. We prepare returns as thoroughly as possible to make sure we are getting the maximum refund possible for our clients, or we are reducing their tax liability as much as legally possible. We do not play games with the numbers to return more favorable results; we provide an honest result each and every time. We will certainly offer advice on how to minimize tax liabilities for future periods! We strive to complete returns within two weeks of drop-off, but this is not a guarantee. Having all information with you at drop-off increases the odds that the two week turnaround time will be met!

Our return preparation includes:

- preparation of 1 federal return and 1 state return (multiple states can be filed at an additional charge);
- E-filing of federal and state returns (where accepted) once payment has been made to TaxSmith for return preparation. We do not e-file or provide hard copies of returns to clients until payment has been made.
- One year of support should you be contacted by the Internal Revenue Service or state department of revenue. We will assist to resolve any items for one year from the filing date of your returns, free of charge!\*

We accept cash, checks and credit cards\*\* via Square (cash or credit cards preferred). Payment is due at time of pickup, and required prior to completing e-filing.



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### **FEE SCHEDULE**

All income tax return preparation schedules include e-filing for federal and state returns (where accepted). Below is the 2017 fee schedule by client type and for additional services as needed.

<b>RETURN TYPE</b>	<b>BASE PRICE</b>
Personal Income Tax Returns (1 state)	\$225.00
Business Income Tax Returns (all but C Corps)	\$350.00
Business Income Tax Returns (C Corps)	\$400.00
Labor per hour (over 3 hours return preparation)	\$75.00
Extension Filing Fee (required to file extension. Considered down payment toward total tax return preparation. Fee will not be refunded for any reason.)	\$100.00
Additional Per-State Filing Fees (if filing in more states than your state of residency)	\$50.00 per additional state

\*TaxSmith will provide up to 10 hours support to resolve issues with the Internal Revenue Service or state taxing authorities at no charge for 1 year from the filing date of your return. Support beyond 10 hours will be billed at \$75.00/hour.

\*\*TaxSmith accepts credit card payments via Square. All credit card payments will have an additional 3% card processing fee added to the invoice.