2775 W US-22 Suite 3
Maineville, OH 45039
(513) 900-9513
https://www.heritageincometax.com

HERITAGE TAX
Representation & Services, Inc.

TAX PREPARATION CLIENT AGREEMENT

Client Name: ______________________________
Client Address: ______________________________
Client Phone: ______________________________

Client Email: ______________________________

I. Introduction

Thank you for choosing Heritage Tax Representation and Services, Inc. for your tax planning and compliance needs. We are a full-service tax firm dedicated to the success of our clients' individual and business needs. Our Enrolled Agents have earned the highest credential the IRS awards. However, we do not work for the IRS and are committed to working in the best interest of our clients.

II. Scope of Work

You are retaining our office for the purpose of tax preparation. Our office will not provide legal services or consultation pursuant to this agreement. Representation before the IRS is available for a separate hourly fee.

We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. Our client questionnaire will help us collect the data required for your return. The questionnaire will also help you avoid overlooking important information. It is important that you complete the questioner accurately as it will contribute to the efficient preparation of your returns and help minimize the cost of our services.

We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will inform you of any material errors, fraud, or other illegal acts we discover.

The law imposes penalties when taxpayers underestimate their tax liability. Call us if you have concerns about such penalties.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

III. Fee Structure and Billing

Payment is due in full when work is completed. Examples: Immediately following in-person consultations and/or video meetings; Work is "complete" when the return is ready to be signed and prepared for filing with the IRS. We will not submit any returns without full payment.

All invoices are mailed (or e-mailed) monthly and due within 10 days of receipt.
The client agrees to a 1.5% late fee (calculated monthly) for payments not received within 10 days of invoice and/or 1.5% fee for document storage.

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We will bill clients $25 for no-show appointments unless the clients provide 24 hours of notice.

IV. Client Concierge Service – opt In by initialing here: ________

By opting into the annual Client Concierge Service, you agree to one-time annual fee of $80 for an individual or $150 for a small business for routine emails and phone calls for questions outside the scope of tax preparation services. This fee covers 2 hours of our time which would otherwise be billed to our clients at an hourly rate. This saves you money and ensures that your preparer is compensated for his/her time and expertise during the off season.

Concierge services continue for one year from the date of payment. Additional services that exceed the two hours of client concierge services will be billed at hourly service rates. If you choose not to "opt in" you agree to be billed in pro-rated hourly increments up to $250/hour for tax research and consultation in topics related to your questions for emails and phone calls to our office and agree to pay for these services when invoiced.

Examples of services that fall under the agreement:

Reviewing IRS or State letters	General advice on filing status for next year
Describing what IRS letters mean in laymen's terms	General advice on dependents
Calculating RMD for a 401(k)	Providing additional copies of tax documents
Answering "quick tax questions" over the phone	Explaining entity rules for business clients

V. Audit Protection

While your likelihood of a tax audit is low, an audit can be time consuming and unpleasant. Our office provides no guarantees, implied or otherwise regarding your likelihood of an audit or results of an audit. We will not engage the IRS on your behalf in the event of an audit. However, we do offer audit insurance through a third-party vendor, Protection Plus. You can file a case with Protection Plus here: https://taxprotectionplus.com/contact-us
If you are interested in purchasing audit insurance for $65 please initial here ____

TO BE COMPLETED BY CLIENT

Initials

________ I have completed the Taxpayer Questionnaire

________ I have read and been provided with a copy of the Frequently Asked Questions sheet and agree to the provisions therein

________ I understand that Heritage Tax Representation and Services, Inc. will not begin work until I have provided all documents necessary to prepare my tax return(s) and certify that I have provided all tax documents requested by my tax preparer and known to me.

________ Unexpected additional work is sometimes required in the course of tax preparation and/or planning despite the best efforts at transparency of both Heritage Tax Representation and Services, Inc. and our clients. In the event we

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identify additional work is required to perform that is not outlined here, we will contact the client with an estimate prior to executing that additional work

VI. Miscellaneous Provisions

We will return your original records (copy of return, etc.) to you at the end of this engagement. Store these records, along with all supporting documents, in a secure location. Additional copies of your tax return documents may be available for a fee.
If you have not selected to submit tax forms with our office, you will be solely responsible to file the returns with the appropriate authorities. Review all forms carefully before signing them. Follow-up questions after signature may require a new client agreement.

Thank you for the opportunity to be of service. If you have any questions, contact our office at (513) 900-9513 (9am-5pm; Eastern Time Zone, USA).
Sincerely,

Aubrey Corcoran

Aubrey Corcoran Bryan Corcoran

Taxpayer or Authorized Representative Date