CREDIT POLICY

SERVICES REQUIRING ENGAGEMENT AGREEMENTS

A signed Engagement Agreement will be required for Tax Services, IRS Representation (audits, collections, and negotiation issues), S-Corp and Nonprofit setup. A retainer or deposit will be required before any services are begun.

TAX SERVICES **-** ***A $200 Deposit** is required for each tax return prepared* in person or by mail (including corporate returns). When the return is completed, the client will be invoiced for any remaining balance (See "Credit Hold Exceptions" Section). Payment terms are "payable upon receipt" and will be considered past due if not paid within 30 days.

Additional Charges

Supplemental Schedules not included in the base fee may result in extra charges.

Additional Time spent to sort and organize supporting documents may result in additional fees. If client chooses NOT to use our tax organizer, we reserve the right to assess additional fees.

Response Delay fees may be assessed if client does not respond to our request for information within two (2) weeks of request.

Special Handling Fees may be assessed if client requests 'in-house rush' or overnight mail service to meet financial aid or IRS filing deadlines.

IRS REPRESENTATION – A signed Representation Agreement must be executed prior to any work performed. A retainer will be required and will be calculated on a case-by-case basis according to the estimated time necessary to satisfy all requirements.

S-CORP & NONPROFIT SETUP – A signed Engagement Agreement and payment must be received prior to any work performed. Payment terms will be outlined in the agreement as to the amount required.

OTHER SERVICES PROVIDED

Consultation appointments (in person or by phone), answering E-mails, Faxes, and Other Correspondence will be considered billable services. *(See Premium Support Package information for services covered under the annual subscription.)* Billable services also include IRS letters answered on the client's behalf and letters to mortgage companies. When billing for services rendered, many factors are considered, such as complexity, degree of expertise required, necessary research, and time involved to prepare an answer that is in the best interest of the client. Unless otherwise stated, services are billed in quarter hour increments at $140 per hour or $35 per quarter hour. (During tax season – January through April - the rate is $190 per hour or $47.50 per quarter hour.) Payment terms are "payable upon receipt" and will be considered past due if not paid within 30 days. ***If "Consent to Release" is required, a credit card payment will also be required for payment in advance!***

PREMIUM SUPPORT PACKAGE & REGISTERED AGENT SERVICES

The Premium Support Package (PSP) and **Registered Agent Services** must be paid in full by check, cash or credit card at the time of enrollment. Benefit coverage begins the day payment is received. If client has a past due balance or is on “Credit Hold,” they will not be eligible for the PSP coverage until the account is paid in full. *THE PREMIUM SUPPORT PACKAGE DOES NOT INCLUDE TAX PREPARATION!*

EXCEPTIONS

ACCOUNTS ON “Credit Hold,” – Past due accounts must be paid in full with cash, certified funds, or credit card prior to receiving service. In addition, the account will be placed on a “cash in advance’ status for subsequent services.

PAST DUE ACCOUNTS - The company reserves the right to refuse service to individuals who have a history of extremely late payments or whose account has been sent to collection by our company.

INSUFFICIENT FUNDS - If our bank receives a “Non-Sufficient Funds” check, the bank automatically sends the check to Checkrite, our check recovery service. Checkrite will add additional fees for collection and may submit the information to credit reporting agencies. (Your tax return or other services will be delayed until Checkrite has notified us of payment. Any penalties or interest charged by the IRS and/or other entities, as a result of the delay, will be the responsibility of the client.)

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