



Terms of Service

In an attempt to keep our clients informed we ask that you carefully read the following. If you have any questions, please see my front desk assistant or speak with me directly. By working closely together towards this goal, we can provide you with better service and avoid confusion in the future.

FEES: Tax and accounting services are \$300.00 per hour, billed in ten minute increments. If your return requires more work than initially anticipated, I will consult with you prior to incurring additional costs.

Our cost of doing business increases each year. Therefore, our tax preparation rates increase each year. Typically, you can expect a 6-10% annual increase on January 1st each year.

PAYMENT POLICY: Payment is due at the time services are rendered or upon receipt of invoice. Income tax returns are not electronically filed until your signed electronic filing authorization forms and payments are received.

PAYMENT OPTIONS: We accept checks, debit/credit cards, PayPal, Zelle, Venmo and cash.

To Recap:

1. You are billed either by the hour or by the job as agreed upon in advance.
2. Please expect your tax preparation fee to increase annually.
3. Payment is due at the time your tax return is complete or services are rendered.
4. Payments accepted are checks, debit/credit cards, PayPal, Zelle, Venmo and cash.

Clients Name/s
(Updated: January 2025)

Date