



Tax Preparation Services Agreement

Outlined below is a service agreement between Whitfield Tax Services LLC (tax preparer), and you (client, customer, tax payer).

1. Whitfield Tax Services LLC will perform the following services:

- Provide you with a Client Information Form and Income Tax Preparation Documents Checklist. Once completed, these documents, along with follow up questions, will be used to determine the most beneficial way to prepare your return.
- Complete a federal tax return.
- Complete the applicable state return.
- Complete the applicable local return.
- Review all documents received and analyze the potential for attaining more deductions and credits;
- Prepare your return to be filed with the IRS and applicable state.
- Discuss your prepared return with you prior to filing the return.

2. Availability

- Whitfield Tax Services LLC will be open from 9am – 9pm Monday – Friday during the tax season. Saturday and Sunday hours are available upon request during tax season.
(January 1 - April 15) After the tax season, the hours of availability will decrease.

3. Delivery of Completed Tax Return

- Completed tax returns will be filed once payment is received.
- The customer may request a copy of the return delivered as a hard copy, via email or fax. Only one copy per tax payer will be furnished free of charge. Each additional request will be \$5 per copy.

4. Security

- Whitfield Tax Services LLC will take every precaution to safeguard clients' information and prevent identity theft.
- Your confidential information will not be shared or discussed with any third parties, except where applicable by law, without tax payer consent.

5. Payment of Services Rendered

- Payment is due in full at the completion of services rendered. Payment for services rendered is due on all completed tax returns whether the client is to receive a refund or not. An itemized receipt of all charges will be printed or emailed to the customer upon completion of payment.

208 Lytton Rd, Moon Twp, PA 15108

Phone: 412-262-1071

Email: RWhitfield@Whitfieldtaxservices.com

Fax: 412-430-4481

Web: www.Whitfieldtaxservices.com



6. Client's Responsibilities/Amendments

- Whitfield Tax Services LLC is not responsible for returns completed without all necessary documentation. After the client informs Whitfield Tax Services LLC to proceed with completing the return, it is the responsibility of the client to ensure all applicable documentation has been provided. In the event, the Client discovers that they failed to provide all documentation and the tax return has already been completed, a fee of \$25.00 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 \$125.00.

7. Pricing & Discounts/Promotions:

- A price list can be found on the Whitfield Tax Services LLC website. Clients may request a price quote prior to agreeing to any services. Price quote will be based off information provided by client. Actual price of services may vary from the quoted price. Actual price will be determined when services are completed. Discounts and Promotions will be offered from time to time by Whitfield Tax Services LLC. Please check the Whitfield Tax Services LLC website for current Discounts and Promotions. Prices and Discounts/Promotions are subject to change without notice.

Please acknowledge that you have read and agree to the terms and conditions set forth above. By signing below, you agree to allow Whitfield Tax Services LLC to prepare your tax return(s). You confirm that all information provided to Whitfield Tax services LLC is correct and accurate to the best of your knowledge. You also agree to pay, in full, for all charges incurred for services rendered by Whitfield Tax Services LLC. If you should choose to terminate this agreement after Whitfield Tax Services LLC has started work, you shall be charged at a rate of \$100/hr for time spent working on your return(s). Failure to pay for services could result in legal action.

Print Name

Signature

Date