

CRM Tax Preparation Services Agreement

Thank you for considering CRM Tax Services to provide you excellent tax preparation services for the 2023 tax year.

Outlined below is a service agreement between CRM Tax Services (tax preparer), and you (client/ tax payer).

1. CRM Tax Services will perform the following services:

- Engage you in a brief consultation to assess the most economical filing method, with the greatest benefit to you
- Complete a federal tax return for individual(s) or business
- Complete any applicable state return(s)
- Review all documents received and analyze the potential for attaining more deductions and credits
- Prepare your return to be e-filed with the IRS and applicable state
- Discuss your prepared return with you prior to filing the return

2. Tax Preparation and other Fees:

- A. **For INDIVIDUAL AND JOINT tax returns** - CRM Tax Services charges a base fee of \$205 for tax preparation. There is an e-filing fee of \$29.95 imposed by a separate entity, and the processing bank charges a fee of \$26.95. All fees total **\$261.90**. If you are filing a state tax return the minimum additional fee will be \$50.
- B. **For BUSINESS tax returns** - CRM Tax Services charges a base fee of \$265 for tax preparation. There is an e-filing fee of \$29.95 imposed by a separate entity, and the processing bank charges a fee of \$26.95. All fees total **\$321.90**.
- C. **Additional Fees** - On more complicated individual/joint tax returns and business returns, there will be additional fees imposed based on volume of tax documents submitted and time logged to prepare the tax return(s).

3. Additional Services: If the client's tax return is audited and client needs the assistance of CRM Tax Services in dealing with the audit, or should the client need any additional services after the completion of their tax return, CRM Tax Services will charge an hourly rate of \$30/hr.

4. Availability: CRM Tax Services hours of operation is 12PM - 9PM, Monday - Saturday during tax season which starts on January 29th and ends on April 15th. CRM Tax Services will make every effort to be available to our clients during off hours if prior arrangements are made. Client is encouraged to email any questions or correspondence to **CRMTaxServices@gmail.com** during business hours and off hours as that is the fastest way to reach CRM Tax Services. After the tax season, the hours of availability will decrease.

5. **Delivery of Completed Tax Return:** Completed tax returns will be provided following full payment of services rendered or the client has agreed to have payment deducted from tax return refund. Upon completion of client's tax return, CRM Tax Services will automatically send a digital copy of the client's tax return via the **client's email address** that is provided on the 2023 Tax Questionnaire. Client can also request to pick up a hard copy of their tax return for which they would need to schedule a date and time to pick up at CRM Tax Services home office.

7. **Payment of Services Rendered:** Our fees for tax services will be at our standard rates for the time logged, plus out-of-pocket expenses, including computer-processing charges and duplicate or additional copies of documents. Payment is due in full at the completion of services rendered. Payment is automatically deducted from clients refund unless other arrangements are made by client. ***Payment for services rendered is due on all completed tax returns whether the client receives a refund or not.*** If CRM tax prepares a client's return and client decides not to move forward with filing, client owes CRM Tax Services the applicable tax preparation fees of **\$205.00**.

8. **Liability:** The Client bears the ultimate responsibility for compliance, including but not limited to:

- Reporting all income received in cash, property, or services from any source
- Keeping adequate books, records, and documentation to support all items on the tax returns
- Payment of all applicable taxes, penalties, and interest
- Timely filing of all documents, including tax returns, extensions, reports, and payments

This liability is not affected by the Client's relying on information or advice obtained from other parties, including but not limited to government agencies, CRM Tax, or other advisors.

CRM Tax will not verify the information furnished by the Client and will not reconcile or audit Client's books, records, and supporting documentation. In any case, CRM Tax shall not assume the Client's responsibility for the validity and completeness of the submitted information. CRM Tax shall not be responsible for disallowance of doubtful or inadequately supported tax return items by the IRS or state taxing authorities and the resulting tax liability, penalties, and interest. Liability of CRM Tax shall be limited to correcting **errors** made by CRM Tax while performing services under this Agreement and reimbursing the Client for the government penalties to the extent the penalties are caused by such errors – not to exceed the service fees charged to client for tax preparation service. This provision is not applicable whenever pertinent facts and information were misrepresented, withheld, or not provided timely by the Client or third parties.

9. Penalties & interest: All interest charges and all late penalties owed to the IRS are always the Client's responsibility.

10. Client's Responsibilities/ Amendments: To the best of your knowledge, you confirm that the information submitted to us to prepare your tax return is correct and includes all income, deductions, and other information necessary for tax preparation. The information provided by you is your own representation to which you deem true and accurate, and has been provided to us with a reasonable amount of time to allow us to adequately prepare your return. CRM Tax Services is not responsible for returns completed without all of the necessary documentation. After the client informs CRM Tax Services to proceed with completing the return, it is the responsibility of the client to ensure all applicable documentation has been provided to CRM Tax Services. In the event the Client discovers that they failed to provide all documentation and the tax return has already been completed and e-filed/filed, an amendment will need to be prepared and submitted to the IRS. The preparation of the amendment and filing will incur an additional fee of \$135.00.

****We cannot guarantee timely preparation of your 2023 tax return or extension and we are not responsible for penalties or interest incurred as a result of late filing of your tax return if any of your tax documentation and supporting documents are received after April 1, 2024.**

Please acknowledge that you have read and agree to the terms and conditions set forth above.

Print Name

Signature

Date