



Tax Return Preparation/Consultation TERMS AND CONDITIONS

TAXPAYER(S) ("TAXPAYER") engages the services of CC: TAX PREPERATION ("CC TAX PREP"), to prepare federal, state and or other tax returns and or tax related documents, and or perform other professional tax work as directed by TAXPAYER pursuant to the following TERMS AND CONDITIONS.

As part of the preparation process, it understood that it is the TAXPAYER responsibility to provide complete and accurate information on all items of income, deductions, etc. The TAXPAYER certifies that they have receipts and other source documents such as W-2s, 1099's and other third party information to support the information provided. The TAXPAYER understands that CC TAX PREP has no obligation to confirm or verify the information provided, and attests to its completeness and accuracy. They further agree to retain these records for at least 7 years after the date of filing the tax returns in the event of a tax audit. If an audit does occur, the TAXPAYER understands there may be additional fees due for any work CC TAX PREP performs in connection with the audit.

In the case of IRS problem resolution matters and or audits, the TAXPAYER understands that their timely sharing of documents and cooperation in communicating with CC TAX PREP as well as expeditious signing of the proper Power of Attorney forms, etc. is required to enhance the opportunity for a positive outcome. The TAXPAYER understands that the cost of preparing tax returns depends on the complexity. The fees charged will be in accordance with the published fee schedule and are assessed based on the documents prepared. The fees due will be clearly stated on an invoice. The total fees may be increased above any original estimates if data is incomplete or additional time must be spent to summarize provided data.

Returns are completed using the information provided by the tax payer and an invoice is issued immediately upon the completion of returns. Invoices are due and payable once issued. Tax returns are not printed or electronically filed until payment in full or a mutually acceptable arrangement has been made for the associated invoice. Invoices not paid in full within 30 days of issue may be subject to additional fees in accordance with the published fee schedule. Payments can be made by cash, check, credit/debit card or if available using a bank settlement product when the TAXPAYER qualifies. **Eligibility for some bank settlement product features is determined AFTER returns have been transmitted for processing.** Once a return has been transmitted we are unable to modify any part of it. It is understood that CC TAX PREP prepares tax returns with the objective of having the least possible tax liability while complying with the law. All work is performed using best efforts, with no guarantee of outcome. The tax law is constantly changing and there is in some situations some uncertainty in the application of tax regulations. CC TAX PREP agrees to do its best to comply with applicable law, and in any case, the liability of CC TAX PREP for breach of contract or negligence or other damages is limited to the fees paid for service.

TAXPAYER consents by use and agrees that the use of an electronic signature pad constitutes your signature, acceptance and agreement as if actually signed by you in writing.

These TERMS AND CONDITIONS shall apply to services for past, present or future tax years beginning on the date of the first engagement and continuing until terminated in writing by either party.

CC: Tax Preparation
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