



Payment Policies

All fees are due before work is started.

We do not offer credit or extend credit terms.

We gladly accept Cash, Checks and Credit/Debit (3% fee will apply).

Tax Returns

1. All Tax Returns are worked on in the order received.
2. Two hours of bookkeeping are included with each tax return. If you give us receipts or any other accounting documentation that has to be totaled or input into QuickBooks, then you will be billed at our current hourly bookkeeping rate of \$75.00 an hour.
3. Once your information is received and payment is received we will send out a list of missing documents needed to complete your tax return. We will not commence further work until we receive the missing documentation. Once we have completed your tax return as based upon having received the missing documentation, if there are any changes after we have printed the tax return, additional hourly charges will apply.
4. On April 1st every tax return will have an extension filed automatically.
5. We do not guarantee that any missing information will be processed before the April 15th deadline.
6. Your tax return includes ONE initial consultation of one to two hours. If you require additional meeting time, our hourly fees will apply.

Amended Tax Returns

1. See above "Tax Returns"
2. We bill at our hourly rate of \$75.00 an hour.

3. We also charge success fees.
4. Generally we do not charge fees up front. We will process the information given us and if we determine that it is beneficial to you, we will inform you of the expected tax savings AND HOW MUCH WE WILL CHARGE YOU.

Bartering

1. In some cases where we determine a client has valuable services and/or products, we will entertain a barter relationship. This may entail the client having to enroll membership into a barter group. Any fees due for such membership are the responsibility of the client.
2. We generally do not engage in one-on-one bartering.
3. New clients are required to complete a credit/debit card authorization form.

Bookkeeping Engagements

From time to time, new or current clients may submit large bookkeeping engagements, which may cover multiple months or years. Sometimes this relates to past business tax returns that have not been filed. In these cases, we require an up-front deposit to cover our internal costs associated with preparing the bookkeeping (i.e. we have to pay a staff accountant). We will also require a completed credit/debit card authorization form, and as work is completed, we will run the charges for the fees due.

Monthly Bookkeeping

1. All fees are due on the first of the month
2. All return checks will result in a charge of \$35.00 per item.
3. New clients are required to complete a "New Client" information sheet.
4. New clients are required to complete a credit/debit card authorization form.
5. All clients must sign an engagement letter of services provided and charges for those services.
6. There will be additional delivery charges, rush charges, etc.

Typical Fee Schedule for Additional Work

Basic Services

Initial Consultation	<i>no charge</i>
Bookkeeping	\$20 to 75 per hour
Clean up of QuickBooks files	\$20 to 75 per hour
Setup of Initial QuickBooks company file	starting at \$100
Tax planning	starting at \$75 per hour
Corporate Tax Preparation	\$100 per hour
Personal Tax Preparation	\$75 per hour (\$100 minimum)
Credit Repair and Personal Finance Consultation	starting at \$100 per hour

High Net Worth Services (tailored)

Real Estate Investment Consultation	\$250 per hour
Securities Investment Tax Planning	\$250 per hour
Trust Tax Planning & Consultation	\$250 per hour
Real Estate Investment Training Course	\$12,000 (2-week 1 on 1 course)