

## **Tax Return Preparation/Consultation Engagement Agreement**

The taxpayers named below agree to engage the tax services of BTS Inc., (dba Triad Tax), to prepare their (years) \_\_\_\_\_ US federal and applicable state returns, and/or perform other professional tax work as we shall direct.

As part of the preparation process, we understand it is our responsibility to provide complete and accurate information on all items of income and deductions for the tax year(s) involved. We certify that we have receipts and other source documents such as W-2s, 1099's and other third party information to support the information provided. We understand that Triad Tax has no obligation to confirm or verify the information we supply, and we attest to its completeness and accuracy. We further agree to retain these records for at least 3 years after the date of filing the tax return(s) in the event of a tax audit. If an audit does occur, we understand there will be additional fees due for any work Triad Tax, performs in connection with the audit.

We further understand that if we indicated to Triad Tax, that our foreign income should not be shown on Schedule C as self employed, then we have represented that we are bona fide employees of a US or foreign employer. We accept responsibility for documenting and proving this fact if we are audited by the IRS. In the event we are self employed and/or independent contractors, we understand we must pay a 15.3% self employment tax on net income.

In the case of IRS problem resolution matters and audits, we understand that our timely supplying of documents and cooperation in communicating with Triad Tax as well as expeditious signing of the proper Power of Attorney forms is required to insure a positive outcome.

We understand that the cost of preparing the return(s) depends on the complexity of the return(s). The fee will be in accordance with the fee schedule page based on the forms prepared. The fee may be increased above that originally quoted if data is incomplete or additional time must be spent to summarize data provided by us.

We have received a current fee schedule and understand that all fees are due upon delivery of the prepared returns. We also understand that any tax returns being electronically filed by Triad Tax will not be filed until payment is rendered for services. Amounts not paid within 30 days of completion will be subject to a carrying charge of 1% per month. Payment can be made by check, cash or credit card. We agree to pay any incurred costs for copies, fax, long distance, overnight shipping or other expenses incurred directly by Triad Tax, in preparation of the return(s).

Tax consulting and representation to resolve problems with the IRS will be billed at the hourly rate of \$200. In situations where the estimate of work involves greater than one hour, a retainer of \$1000 will be paid in advance of the work starting and time will be billed against the retainer after which regular billing will occur. Monthly bills showing time spent will be sent to us for review and payment. At the time of signing this engagement agreement, it is agreed that credit card or bank information will be provided by the client in order to assure payment. 30 days after an invoice is presented, if payment is not received, the credit card or bank account on file can be charged for all outstanding amounts due.

It is understood that Triad Tax, prepares tax returns with the objective of having the smallest 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 some uncertainty in the application of tax regulations. Triad Tax, agrees to do its best to comply with existing law, and in any case, the liability of Triad Tax, for breach of contract or negligence is limited to the fees billed for service.

Bernie Taillon, CPA  
BTS, Inc. doing business as Triad Tax

---

Print Name

Signature

Date