

Uldedaj Accounting, Tax & Business Services, LLC
Phone/cell:586.213.3605; email: violet@uldedaj.com
www.uldedaj.com

CLIENT SERVICE AGREEMENT

What I will do:

- I will ask questions required to gather enough information to complete your tax return in a competent and legal manner.
- My fee for tax return preparation does not include bookkeeping; therefore, you will provide completed books, spreadsheets or other organized summary of any business activity.
- I will use my judgment and experience to prepare your return to take advantage of all deductions and credits available to you in order to minimize your tax obligation/maximize your refund in a matter consistent with the law.
- Fees charged for tax return preparation do not include audit representation or for preparing materials to respond to IRS or State notices. They do cover limited assistance to respond to notices and consultation during the year.
- I will make every effort to complete your return by the tax deadline, but if information necessary to complete the return is not available with less than two weeks before deadline, you should be prepared to file an extension, which I will do for you at no additional cost. Please note that an extension provides additional time to file, **not** an additional time to pay. Interest will accrue on any balance due.

What I won't do:

- I will not audit your information and I am not required to independently verify the truthfulness of statements you make to me. However, I will not take a position on your tax return that in my opinion is more likely than not to be unsupported before the IRS or state tax authority. Should a tax authority rule contrary to us in a tax issue, my liability is limited to the fees you paid.
- I am under no obligation to, nor will I, share with the IRS or state tax authority the nature of my discussions with you during the tax interview.
- I will not disclose any non-public personal information about my clients or former clients to anyone, except as requested by my clients or as required by law. I maintain physical, electronic and procedural safeguards that comply with federal regulations to guard your non-public personal information.
- **I will not charge you for additional services such as E-filing, Direct Deposit of Refunds, filing of extensions, mailings to the IRS, notification on when to expect your refund and providing copies of all tax documents and returns while you are my client.**

What I need from you:

- You must make an appointment in advance. I will only accept walk-ins as my schedule allows and do not guarantee completion of your return at the time of your visit.
- I will ask for proof of identity and information such as your name, address, telephone number, date of birth, social security number, dependents, income, banking information for direct deposit of refund and other tax-related data.

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- Tax forms such as W-2, 1099 forms such as 1099-R, 1099-INT, 1099-DIV, 1098 forms such as 1098-T (Tuition) or 1098 Mortgage Interest Statement, etc.
- The law clearly holds you accountable for the accuracy of your return. You must be able to provide written records of all items included on your return if audited. I recommend keeping records of tax information for seven years. **As part of my services to you, I will keep copies of all tax returns and supporting documents and forms used.**
- **I require payment of all fees prior to my providing you a copy of your tax return and a signed e-file authorization before electronically filing your return.**

By answering the question below in the affirmative, you agree that you have read, understand, and accept your obligations and responsibilities stated above, plus you understand my responsibilities and limits of liabilities as explained above. Additionally, you declare that you will provide me all income information, and that all expenses or other deductions are accurate and that you have all required supporting written records.