



## Personal Tax Return Service Agreement

Between: NW Accounting Inc  
1307 NE 78<sup>th</sup> Street B12, Vancouver, WA 98665  
and listed taxpayer(s)

Today's Date: \_\_\_\_\_

Tax year(s): \_\_\_\_\_

Taxpayer Name: \_\_\_\_\_ Spouse Name: \_\_\_\_\_

**ID is required:** *We must have current ID on file, please provide it. We cannot release documents to you without it.*

#1 Phone Number: \_\_\_\_\_ Cell / Home #2 Phone Number: \_\_\_\_\_ Cell / Home

#1 Email Address: \_\_\_\_\_ #2 Email Address \_\_\_\_\_

If you ARE NOT the Person above: Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

### What our Service Includes:

- One tax preparation interview. Additional appointments, lengthy discussions and accounting are generally billed separately at an hourly rate.
- Electronic Filing of the tax return (if allowed by the government agency) after all taxpayers have properly signed their tax authorization to e-file and the fee to NW Accounting Inc. has been paid.
- Brief consultation phone calls during the year at no additional charge. We will notify you when you have exceeded the "free time".
- One Client Copy of the applicable Federal and State Returns.
- Help calculating your estimated tax payment for the next tax year and instructions how to make payments. IRS requires taxpayers to prepay their taxes. If you choose not to participate in making estimated taxes or adjusting your withholding you may face penalties.

### General Policies:

- Tax law is complex. Should any employee of NW Accounting Inc. make an error that is our fault and it creates additional penalties or interest, NW Accounting Inc. will pay penalties and interest but NOT any tax that is due. Tax is always the responsibility of the taxpayers on the return.
- In the event of an audit or Notice Letter, NW Accounting Inc. will assist you. There is a separate charge for these services. Should you choose to represent yourself in an Examination (by mail or in person), NW Accounting Inc. or the tax preparer cannot accept responsibility for the outcome unless it is clearly the fault of an error on the return. A Taxpayer "giving in" and not reasonably defending the position to a government agency is not our fault. Arbitration may be needed to determine fault.
- NW Accounting Privacy Policies are on our website and will be provided in final tax return documents.

**By Signing, I have read both sides of the agreement and understand the terms of our agreement and the extent of the services Northwest Accounting Inc. will provide for the tax year listed above.**

Taxpayer Signature \_\_\_\_\_ Spouse Signature \_\_\_\_\_

Date: \_\_\_\_\_

Staff Signature: \_\_\_\_\_

Confirmed ID: Taxpayer \_\_\_\_\_ Spouse \_\_\_\_\_

### **What is Expected from CLIENT:**

1. **Timely provide complete tax information.** If we ask the client for more information, it is expected that we will receive a response within 14 days. Failure to respond may result in delays in processing your tax return.
2. We depend on you to provide **Accurate Information** needed to prepare the tax return. We may ask you to clarify some items, but we do not audit or otherwise verify the data you submit. Using an organizer, reminder list and participating in an interview are ways we try to get information, but the client is ultimately responsible for providing information to us about all income received during the year. If we receive written notes or accounting data, it is deemed that the client took reasonable caution to properly provide the numbers.
3. If required information is not submitted by March 31, of the current year, the client hereby grants automatic permission to NW Accounting Inc. to file an extension, if necessary.
4. The client understands an **Extension to prepare the tax forms is NOT an extension to pay their tax bill.** IRS will start imposing Penalties and Interest for non-paid taxes on April 15<sup>th</sup>. NW Accounting Inc. is not responsible for these penalties and interest.
5. **The client must keep adequate records** needed to substantiate income, deductions, credits and tax basis for any transactions on the return. You must maintain copies of these documents for four years. ***It is the client's responsibility to provide these documents should there be an audit.***
6. If the client is involved in **Digital Assets (Crypto) or has other sales of assets or investments** during the year they will disclose it to the tax preparer.
7. If the client has any **FOREIGN ASSETS or INCOME** greater than \$10,000 on any given day during the year, additional tax forms may be required. NW Accounting Inc is not responsible for penalties related to foreign assets.
8. The client will review the completed Tax Return before signing to verify the information contained is true and correct. It is the client's responsibility to sign their return by the due date of the return. You can sign in person at our office or electronically through the secure portal.
9. **The client will pay the tax preparation bill from NW Accounting Inc in full when presented to the client for signatures.** Dishonored checks can result in an extra fee.
10. The client will notify the Preparer within 7 days of any correspondence received from the Internal Revenue Service, or any State Agency regarding your tax return.
11. **The client accepts Full Responsibility** for paying their taxes in full including any penalties and interest.

### **The Tax Preparer will:**

1. The tax preparer will use professional judgment in preparing your tax return. We may consult with other preparers to accurately complete the return. We may need to send your return to our software company. We maintain "do not disclose" agreements with all parties we work with to ensure your information is not compromised.
2. The tax preparer will attend education classes each year to stay up to date and know tax law.
3. At times interpretation of tax law can be unclear. The preparer may give you options when preparing your taxes. If you choose to take an unclear position, or you choose to take a position on your taxes that we may not be able to defend, we may ask you to sign a waiver of liability for that position.
4. The tax preparer will timely deliver tax information for the return for filing. Please allow 14 days after submitting your *FINAL* data for the preparation of the return to be complete.
5. Keep all information received from the Client as confidential and subject to disclosure only at the request of the Client or as compelled by law for regulatory matters.