

Date \_\_\_\_\_

Business Name \_\_\_\_\_

Contact \_\_\_\_\_

Address \_\_\_\_\_

Email \_\_\_\_\_

Phone \_\_\_\_\_

Date S-Corp Election Effective (This must match the IRS) \_\_\_\_\_

When complete, fax this signed Agreement & tax documents to (888) 391-1226, or, upload securely to our Lockbox at [www.accountingoncall.com/Lockbox](http://www.accountingoncall.com/Lockbox). \*Important: You must provide a copy of your Income Tax Return from last year.

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**Client Agreement**  
**2011 Business Income Tax Return**  
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We appreciate the opportunity to prepare your **2011 Tax Return!**

*Your return will be prepared based on information and documentation that you provide without independent verification by this firm.* You are authorizing Accounting On-Call LLC to prepare review & discuss with you or your spouse any previous tax returns, documents and worksheet you provide.

*We will carry over many details from your prior year return.* It is critical you tell us of any owner, asset, loan & financial changes which have occurred during this last year. If in doubt if something is relevant, we advise telling us so we can make that determination.

*It is your responsibility to maintain, in your records, the documentation necessary to support the data used in preparing your tax returns.* This firm may provide you with a questionnaire to assist you in gathering and organizing the required tax return data in order to keep the tax preparation fees to a minimum. You agree to make available information about all of your income and deductions so that substantially correct amounts of income and tax can be properly reported. This firm is not responsible for the disallowance of doubtful deductions or inadequately supported documentation, nor for resulting taxes, penalties and interest.

*Provide your tax documents as soon as possible.* You may securely deliver your documents to our office by any of three methods: 1) **Upload** your tax documents to our secure server to the secure Lockbox on our website. 2) **Fax** documents to 888-391-1226. 3) **Drop off** your documents at our office.

Whichever method you choose, please use this completed & signed Agreement as a cover page.

The next day, we'll email back a confirmation that your tax documents were received and give you the date to expect your completed return. Once we've finished your return, we'll upload a copy to your private Lockbox for your review as well as the forms that need your signature. Send back the signed forms, we'll E-file your return and give you a date to expect your refund.

***To ensure timely filing, please promptly provide any requested follow-up materials and any missing information.*** If this firm has not received all of your tax return information in early April, we may not be able to complete the return before the filing due date. **If you have signed this form, you authorize this firm to file an extension as we deem necessary.**

This firm is responsible for preparing only the income tax returns. The preparation fee does not include responding to inquiries or examination by taxing authorities. However, the firm is available to represent you and the fees for such services are at the firm's standard rates and would be covered under a separate engagement letter.

It is understood that anything you tell this firm during the interview for the preparation of your tax return is confidential, but not protected from the IRS or state tax authority. In addition, the firm cannot disregard the implications of any information you provide in the process of preparing your return. Any of the work papers used to prepare your returns, as well as the communications between you and this firm can be summoned by the IRS in a legal action against you. If this is of concern to you, you should discuss this with legal counsel prior to engaging this firm for the preparation of your returns.

This firm will use its best judgment to resolve questions in your favor where a tax law is unclear, if there is a reasonable justification for doing so. Whenever we are aware that a possibly applicable tax law is unclear or that there are conflicting interpretations of the law by authorities (e.g., tax agencies and courts), we will explain the possible positions that may be taken on your return. We will follow whatever position you request, so long as it is consistent with the codes and regulations and interpretations that have been promulgated. If the IRS or a state tax agency should later contest the position taken, there may be an assessment of additional tax plus interest and penalties. We assume no liability for any such additional penalties or assessments.

Fees for services will be at the firm's standard rates. Occasionally, especially complex returns or schedules require additional fees. Your prior authorization will always be obtained for any additional fees.

Normal Fees: *(Please mark the applicable fee below. Our office will contact you to explain if there is a question)*

_____	\$395	Form 1120S – S-Corporation
_____	\$495	Form 1120 – C-Corporation (This includes the Florida Form F-1120)
_____	\$100	State return
_____	\$375	Accountant Fiscal Year Closing & Financials <i>(bookkeeping not included)</i>
_____	\$ 45	Each. Enter & code bank statement page into Quickbooks
_____	\$ 55	Hourly. Bookkeeper work as required.
_____	\$125	Hourly. Additional Tax Accountant work as required.

We ask for your payment prior to E-Filing your tax return. We accept major credit cards and online payment via your checking account. **It is critical & your responsibility to review your tax returns carefully before signing.** You will be provided a complete Client Copy of your completed, filed return.

All tax returns will be E-filed at no additional charge.

Sincerely,

*Karl E. Sexton, E.A.*

Senior Partner  
Licensed Enrolled Agent  
**Accounting On-Call, LLC**

Please answer the following questions:

What is your Business activity \_\_\_\_\_

What is your specific Product or Service \_\_\_\_\_

1. Has there been a change in ownership since the last tax filing?
2. Is this a final return for the business
3. At the end of the tax year, did the corporation own, directly or indirectly, 50% or more of the voting stock of a domestic corporation? \_\_\_\_\_(yes/no)
4. Has this corporation filed, or is it required to file, Form 8918, Material Advisor Disclosure Statement, to provide information on any reportable transaction? \_\_\_\_\_(yes/no)
5. Has this corporation issued publicly offered debt instruments with original issue discount \_\_\_\_\_(yes/no)
6. Was the corporation a C corporation before it elected to be an S corporation or was the corporation acquired from a C corporation.

Thank you!

X \_\_\_\_\_  
Officer                      Date                                      Name and Title