



Fees and Payment Agreement

Introduction

This Fees and Payment Agreement ("Agreement") outlines the terms and conditions related to the payment for tax preparation and consultation services provided by Select Tax Solutions LLC ("We," "Us," or "Our") to the Client ("You" or "Your"). By engaging our services, you agree to the terms specified in this Agreement.

1. Fee Structure

1.1 Service Fees

- **Tax Preparation Services:** Fees for tax preparation are based on the complexity of your tax return, the number of forms and schedules required, and the time spent by our professionals.
- **Consultation Services:** Fees for tax consultation are billed at an hourly rate of \$200, with a minimum charge of \$150, unless otherwise agreed upon in writing.
- **Additional Services:** Any additional services requested beyond the original scope will be subject to additional fees, which will be communicated and agreed upon before commencement.

1.2 Estimates

- **Good Faith Estimates:** We may provide an estimate of fees upon request. Estimates are based on the information available at the time and are not binding. Actual fees may vary.

2. Invoicing and Payment Terms

2.1 Invoicing

- **Invoice Issuance:** We will issue an invoice upon completion of the services or at agreed-upon milestones for ongoing services.
- **Invoice Details:** Each invoice will detail the services provided, the hours worked (if applicable), and the total amount due.

2.2 Payment Due Date

- **Tax Preparation Services:** Payment for tax preparation services is due in full before your tax return can be submitted to the tax authorities. We will not file or release your tax return until payment has been received.
- **Consultation and Additional Services:** Payment is due within 15 days from the invoice date, unless otherwise specified.
- **Immediate Payment:** For certain services, we may require immediate payment upon delivery of the final documents.

2.3 Payment Methods

- **Accepted Forms of Payment:**
 - **Credit/Debit Cards:** We accept major credit and debit cards.
 - **Online Payment Platforms:** Square.
 - **Banking Products:** We offer banking products that allow you to pay our fees directly from your tax refund. Please inquire for more details.
 - **Cash**

2.4 Initial Intake Fee

- **Initial Intake Fee Requirement:** For new clients an initial intake fee of \$100 may be required to cover preliminary work to assess and understand your specific tax situation and determine the scope of services you'll need.
- **Application of Initial Intake Fee:** The initial intake fee will be applied towards the total tax preparation fee.

3. Late Payments and Penalties

- **Service Interruption:** We reserve the right to suspend or terminate services if payments are not received in accordance with this Agreement.
- **Notification:** You will be notified in writing before any suspension or termination of services due to non-payment.

4. Modifications to Fee Agreement

- **Changes in Scope:** Any changes to the scope of services may result in adjustments to the fees. Such changes will be communicated and agreed upon in writing.
- **Annual Adjustments:** We reserve the right to adjust our fees annually. You will be notified of any changes prior to the commencement of services for the new period.

5. Confidentiality and Data Protection

- **Secure Payments:** All payment information will be handled securely in compliance with applicable laws and regulations.
- **Privacy Policy:** Please refer to our Privacy Policy for details on how we protect your personal and financial information.

6. Acceptance of Terms

- **Agreement to Terms:** By engaging our services and making payment, you acknowledge that you have read, understood, and agree to the terms and conditions of this Fees and Payment Agreement.