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IMPORTANT INFORMATION REGARDING BUSINESS INCOME TAX SERVICES

We appreciate your contacting Mangold Anker Phillips, PLLC and look forward to working with you. With over 150 years combined experience as certified public accountants, we deliver a high value to our clients. We trust that you will be pleased with our performance. To minimize the possibility of misunderstanding between us we are providing you the following information regarding the processes, nature, and scope of the tax services we provide.

Please contact our office to schedule your initial appointment. Please bring the prior three years' tax returns, recent financial reports, corporate entity documents and a completed *Client Application Form* to maximize the value of the initial appointment. We offer a thirty-minute initial appointment at *no charge* to become acquainted and discuss services or an initial consultation with a professional accounting fee based upon the firm standard hourly billing rates. If you enter an engagement with our firm, the fee for the initial meeting will be credited toward the first invoice. A CPA will give you a fee quote upon request and review of the prior income tax returns. We require a signed engagement letter and a deposit before we begin tax preparation services.

Tax Season - We experience a surge of client contact during this short time; however we are a year-round business staffed with experienced tax professionals, not part time seasonal workers with two weeks of training. For our staff to have somewhat normal lives during tax season and ensure the accuracy of all of the returns prepared by our firm, **the pricing in the agreement assumes that all tax returns will be extended and filed after June 1, and prior to the extended due date. If for any reason you require your tax returns to be completed by the original due date we must be notified 45 days in advance and a surcharge of 25% of our standard rate for the return will be due upon delivery of the return.**

We file extensions for the tax returns not completed by the initial filing deadline. Our having as much tax data as possible is still valuable in our filing extensions. If we do not hear from you prior to fourteen days prior to the initial deadline, we will not file an extension for your income tax return. If we request additional data, your prompt response helps the process and will avoid delay.

You should review your income tax returns carefully before you sign the electronic filing authorization form as you have the final responsibility for everything on the return.

Our fees for a business income tax return preparation are due at the time we deliver the completed return to you and before we electronically file the return. Payment of our fee is in no way contingent upon your ultimate tax liability or receipt of any refund.

We will provide you a copy of your tax return as a PDF document via our ShareFile portal. We no longer will be delivering paper copies of completed tax returns unless asked specifically for them.

Tax Return Copies - We maintain complete confidentiality with all information that is part of our relationship. We are legally prohibited from sending any tax or accounting records to any third party without your specific written consent. To avoid the delay and hassle of obtaining these consents, we will only provide these copies electronically and we will only send your records directly to you, and you may forward them as needed. *We provide a copy of every return or document we prepare to you at the time it is completed. All requests for additional copies of prior years' tax returns or documents must be received at least one week in advance.*

IRS Representation - We expect a substantial increase in IRS inquiries in the coming years. Upon a client's request, Mangold Anker Phillips will provide IRS representation. Many IRS auditors know the managers at our firm and know we have the expertise to handle these situations competently and fairly. You may be asked to provide the backup documentation of your tax records. Our firm will invoice IRS representation separately as a service not included in the income tax return preparation fee.

Year-round Tax Services – In order to better serve clients' income tax compliance requirements, we offer proactive tax planning, consulting for investments or accounting concerns, and quarterly or year-end tax projections. A tax plan, usually scheduled in the summer or fall, recommends the most beneficial tax-saving strategies customized for you, and we can assist you with the implementation of the strategies during the tax year. By having as many issues as possible resolved by year-end, the tax preparation process is more efficient, and we will not have to rush to complete your return during the normal tax season.

Please contact us whenever you have any questions or comments, to request further information, or to request an appointment for any of the year-round tax services.