Welcome to Faithful Finances! We are excited about the opportunity to work with you and provide quality tax services for you and/or your business. We take pride in providing superior service , tax accuracy and an excellent customer on-boarding experience. To ensure a complete understanding this letter outlines our agreement and terms of Faithful Finances, LLC (tax preparer) and you (individual or business owner).

Scope of Work

Faithful Finances offers 5 valuable tax promises to each client when preparing their taxes.

1. Research. We promise to fully research and look for all the credits and deductions you deserve to legally maximize your return.
2. Review. We promise to review all documents submitted for verification. We will do our due diligence to ensure all documents are original and complete. We will ask the necessary questions to ensure your understanding of the documents you provide to us.
3. Prepare. We promise to properly prepare your tax return based on the information you provide us.
4. Educate. We promise to educate you on your tax return and show you everything in it so that you know and understand your complete tax situation. We also are a year round tax agency available to our clients all year round.
5. File. We promise to properly file your tax return to the federal and state agencies; e file & direct deposit available.

The Process

Faithful Finances has a 5 Step Virtual Tax Process which makes it convenient for our clients to file.

1. Activate your client Portal on TaxDome. We invested into a streamlined customer portal to increase the convenience, accuracy and security of our client files. This portal is where you will upload, receive and sign all documents and make any payments. ***Please download ‘TaxDome’ on your IOS or Android device and turn notifications on so you don't miss a message. Be sure to use the info below for access to the portal.

   Login: your email address
   Password: password you created
   Firm Name: faithfulfinancesllc
2. Review and sign engagement letter and consent forms. This letter will advise you of all documents you need, our value exchange, and tax consent forms needed to prepare your return.
3. Complete client intake form and upload documents. This gives us the information to maximize your tax return with proper credits and deductions specifically for your situation.

4. Schedule your tax appointment to review and file your tax return. You (and spouse) will have a 30 minute call with the CEO, Janae Pollard to review your return for a third time together and submit for filing. You will be able to answer any final questions before filing.
5. Verify all documents are uploaded and check your messages in case you missed anything. We will message you for any missing information we discover during our preparation. We must have all documents at least 72 hours before your appointment time or your appointment may be rescheduled.

What We Won't Do

We will not provide any financial statements and will not perform any compilation, review or external audit of any of the financial information you provide us. We do not provide legal services of any type. Should the need arise in certain situations, Faithful Finances, LLC will refer you to a certified public accountant to speak to the IRS on your behalf.

Security

Faithful FInances,LLC takes your information seriously which is why we invested in our secure TaxDome client portal.

- ❏ All financial information must be submitted through the portal. Do NOT text or email us sensitive information or tax documents for all records sent via email or text will be deleted upon receipt. Your client portal is the safeguard to your information.
- ❏ Upon filing your tax return, Faithful Finances will print and store your documents securely in a locked filing cabinet for 7 years beyond the filing year.

Value Pricing

Simple Return | $300

Individual filing single or married filing separately with one w2.

Simple Return with Dependent(s) | $375

Head of Household, Married filing separately or Qualifying widower filing status with up to TWO dependents. Each additional child or dependent receives child tax credits and are $75.

Married filing jointly | $550

Married filing jointly with up to two w-2s and standard deduction.

Married filing Separately | $425 each

Married filing separately with itemized deductions.

Expert Plans

Independent Contractor | $425 and up

Independent contractor with a 1099 filing a Schedule C return. We will maximize your deductions taking home office, mileage and other appropriate credits ordinary for your industry.

Schedule C filer | $ 550 and up
Small business sole proprietor (or LLC) filed on the individual tax return 1040. Maximum credits geared to your industry.

Corporate tax returns | $725 and up
Corporations return for the small business owner. This includes strategy planning based on your future goals of the corporation.

Additional income forms | $35
Additional Credit and Deduction| $55
Additional Schedules | $75

Delivery of completed tax returns

- Completed tax returns will be provided through the client portal following full payment of services rendered.
- If payment is not deducted from a tax return for any reason after submitting to the IRS, payment must be paid before receiving a copy of tax returns.
- We recommend clients print or file their completed returns for a minimum of 5 years after filing.

Amendments

All clients must sign this engagement letter and complete the client intake form before any returns are prepared by Faithful Finances, LLC. Once all documents have been received through the client portal, contact will be made within 72 business hours for any updates and/or to review your tax return. All tax preparation fees and deposits are non- refundable. Faithful Finances is not responsible for any delays caused by IRS, regulations or tax software technical issues. You will be made aware of any changes that may impact or delay the completion of your return including office closures, technical issues, natural disasters, etc. Faithful Finances is not responsible for returns completed without all of the necessary documentation. It is the responsibility of the client to ensure all documentation is provided to Faithful Finances. In the event the client discovers he or she failed to provide all documentation needed and the tax return has already been completed, a fee of $75.00 will be assessed to make the necessary changes. If the client’s discovery is made after filing said tax return, a fee of $125.00 will be assessed to complete the amended tax return.

Client’s Responsibilities

All clients must give consent for Faithful Finances to contact the refund offset line on your behalf. If it is discovered that you have a prior debt obligation, or you have gone exempt all year and/or have a less than average amount withheld from your state or federal income you will be required to pay tax preparation fees upfront. By signing this agreement, you understand that everyone does not get a refund. You must file a tax return whether you receive a refund or not. This is to maximize your deductions based upon your filing status within the limits imposed by the Internal Revenue Service.
Returns will be completed in the order in which they are received. Please do not submit any documents, nor sign this agreement unless you are requesting our tax preparation services. If you submit any documents to Faithful FInances that would be required to file a tax return and you have signed this agreement, you are giving consent to prepare your return and agree to be liable for any tax preparation fees, which can be taken out of your federal refund at time of services rendered including bank fees via Refundo, Inc. You also are giving consent to send any necessary information on your current or previous return(s) to be submitted to our bank partner, Refundo Inc. Legal action may be taken for unpaid balances after 30 days.

Please acknowledge that you have read and agree to the terms and conditions set forth above and that all information provided to prepare your return is true to your knowledge and holds no bearings to any staff or preparers of Step It Up Solutions LLC.

Client Signature: ____________________________________ Date _______________
Spouse Signature: ____________________________________ Date_______________