

# Leading Edge Tax Planning, LLC

Individual & Family Client Agreement - Tax Year 2019



This agreement between the undersigned client and Leading Edge Tax Planning, LLC ("LETP") applies to the client's needs and LETP's professional services for the current calendar year. LETP is in the business of providing accounting, tax planning advice, and tax preparation services. All work will be limited to these services.

## LETP's Responsibilities:

1. We will provide honest and accurate accounting, tax preparation and tax planning advice within the confines of all applicable laws.
2. We will meet all required deadlines assuming that client has provided necessary information. If LETP must research personal information for client that is necessary for the work at hand, the client will be billed for that time.
3. We will use the least amount of necessary time when completing client work to keep invoices reasonable. We will notify the client if the work will require more time than originally expected.
4. We will e-file all tax returns when possible.
5. We will provide paper and/or electronic copies of all financial reports and/or tax filings to the client promptly.
6. We will be available to answer questions and provide information promptly.
7. We may choose to represent you in the event of an IRS or state agency audit. If we cannot represent you, we will assist you in finding an appropriate representative.
8. After accepting you as a client, if at any point we feel that your needs exceed our experience or comfort level, we will assist you in finding an appropriate service provider.

## Client Responsibilities:

1. **Necessary Information** It is the client's responsibility to provide LETP with the necessary information to prepare financial statements and/or to file tax returns. Client will provide all required information in writing as much as possible. It is recommended that clients maintain all records needed to substantiate income and deductions reported to government agencies, even if LETP does not require said documents in its preparation. We also recommend that clients back up all electronic documents, including information stored in accounting software such as Quickbooks and Xero.
2. **Information Deadlines** All information needed to prepare the client reports and/or filings will be provided by the appropriate deadlines. Complete client information must be submitted to LETP no later than 2 weeks from the first tax deadline. If a client file is incomplete within 2 weeks of the first tax deadline, LETP reserves the right to file an extension.

**If client information is not provided within 2 weeks of the final tax deadline (i.e., October 15<sup>th</sup> for individuals), LETP reserves the right to terminate this agreement, refuse to complete the return, and client will be responsible for the hourly billing incurred by LETP to date.**

3. **Filing Deadlines** Client is ultimately responsible for the timely filing of all tax returns and the payment of all tax obligations. Any penalties or interest incurred as a result of late filings or underpayment of tax will be paid by the client directly to the appropriate government agency. LETP cannot accept any payments of tax.
4. **Invoices** Client is responsible for paying LETP's fees **prior to** receiving financial statements or tax filings. Tax returns will not be e-filed or mailed to the government agency until payment has been received. Some client projects may require a deposit before work commences. If your work is on a continual basis, your invoice will be due monthly within 15 days of month-end.

Client invoices are based on a fee per form (for tax returns), hourly, or a combination of the two when appropriate. Hourly charges will vary depending on the complexity of work, but are typically \$75/hr for administrative tasks and \$150/hr for legal and statutory. Bookkeeping/Accounting work will be billed at \$50/hr. Delinquent invoices will be subject to a late payment charge of 1% per month, or 12% per year. We accept checks, cash, ACH transfers or credit cards. Credit card payments will be subject to a fee.

## Important Basic Tax Info:

Many taxing agencies permit the taxpayer to authorize us to discuss, on a limited basis, aspects of your return for one year after the return's due date. Unless the client tells us otherwise, we will check the box on the return that gives us that authorization.

Please keep the following in mind when preparing documents for filing deadlines:

Estimated Tax Payments Due: April, June, September & January 15  
March 15<sup>th</sup>: Partnership and S-Corp Tax Returns Due  
April 17<sup>th</sup>: Individual and Corporate Tax Returns Due  
September 15<sup>th</sup>: Corps, S-corp & Partnership Extensions Due  
October 15<sup>th</sup>: Individual Taxpayer Extensions Due

There are a number of other deadlines depending on your tax entity.

## Leading Edge Financial Planning Clients Only:

I agree that Leading Edge Tax Planning, LLC., may share my personal tax information with its affiliated company, Edge Financial Planning, in order to better accomplish tax planning, retirement, investment and other financial services.

## Agreement:

If the tax services and terms outlined above are in accordance with your understanding of our engagement, please sign this agreement and return with your tax information. We appreciate your choice in hiring us to assist you with your tax and accounting needs.

\_\_\_\_\_  
Client 1 Signature

\_\_\_\_\_  
Client 1 Printed Name

\_\_\_\_\_  
Client 2 Signature

\_\_\_\_\_  
Client 2 Printed Name

\_\_\_\_\_  
Leading Edge Tax Planning, LLC

\_\_\_\_\_  
Date

Leading  
proactive  
planning



## Current Leading Edge Financial Planning Clients Only

### Permission to Share Information

I hereby authorize Leading Edge Financial Planning, LLC to share my/our financial information with the following, as necessary to provide advice or service:

Name	Relationship
Leading Edge Tax Planning	CPA/Tax Preparer

I understand that this authorization shall remain in effect unless and until I choose to revoke it in writing, which I may do at any time. I further understand that this does not constitute a power of attorney over my account(s).

\_\_\_\_\_  
**Client Signature**

\_\_\_\_\_  
**Client Signature**

\_\_\_\_\_  
**Printed Name**

\_\_\_\_\_  
**Printed Name**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Date**