

Outlined below is a service agreement between Artist Tax Prep (Tax Preparer), and you (Client, Taxpayer).

1. The Tax Preparer will perform the following services:

- Prepare a federal tax return (1040)
- Complete the applicable state return(s)
- Review all documents received and analyze the potential for attaining more deductions and credits
- Prepare your return to be filed with the IRS and applicable state(s)
- Send your prepared return to you prior to filing for review and signature
- File the completed return (e-file is required unless it becomes necessary to mail a hard copy)

2. Representation/Limits of Service:

Following filing of the return, the Tax Preparer cannot communicate with the IRS or states on behalf of the Taxpayer (but may consult with the Taxpayer if needs arise).

If you are selected for audit by no fault of the tax preparer and require assistance, the hourly consultation rate applies.

The tax preparer has no special relationship with the IRS or state/local government agencies and cannot check the status of your refund for you.

Artist Tax Prep provides individual tax preparation services. Your tax preparer is not a tax planner, advisor, or general consultant.

Work outside the service agreement or in addition to any tasks essential to preparing the tax return is not included in the tax preparation fee. The tax preparer will always confirm fees with the Client before providing services outside the tax preparation agreement.

State LLC and business filings that are not included as part of the individual tax return cannot be filed by Artist Tax Prep. We cannot prepare partnership or corporate tax returns.

We do not prepare local tax filings that are not included with your state's return including in Pennsylvania, Ohio, and Michigan.

3. Security

The Tax Preparer will take every precaution to safeguard Clients' information and prevent identity theft in accordance with IRS guidelines. If any data is breached, leaked, or in the event of a suspected leak/breach, Artist Tax Prep will follow and provide the Client with a written security plan.

If the Client shares documents or sensitive information with Artist Tax Prep via e-mail or text, rather than by using our secure online portal (verifyle), the Client is risking their data security.

4. Payment of Services Rendered

Payment is due at the time of services rendered (when the Tax Preparer sends the Taxpayer the tax return to review and sign). Payment for services rendered is due on all completed tax returns whether the Client is to receive a refund or not. Taxpayer agrees to pay the tax preparation fee when they engage the Tax Preparer's services. If the Taxpayer requests a change to the tax return that is deemed illegal or unethical by the Tax Preparer or if the Tax Preparer cannot reasonably prepare the return based on the information provided by the Taxpayer, the contract may be terminated and Taxpayer documents destroyed. Acceptable forms of payment are check, cash, Venmo, Cash app, Paypal payment, or Zelle. Credit card payments may be available for a fee. The amount of payment is specified via e-mail by the Tax Preparer and reflects the rate schedule e-mailed to the Client OR amount agreed upon in writing by the Tax Preparer and Taxpayer. Your tax preparation fee can never be deducted from your refund.

5. Client's Responsibilities/Amendments

Taxpayer documents are due to the tax preparer by 11:59 PM on the agreed-upon deadline date. This includes income/expense organizers and direct deposit forms. The Tax Preparer will ask follow-up questions if necessary, based on the Client's intake form and prior year return(s), but ultimately it is the responsibility of the Client to ensure all relevant information and documentation has been provided.

Additional documents requested by the Tax Preparer after the Client's deadline must be submitted within 48 hours to ensure completion of the tax return by IRS deadlines. If agreed-upon deadlines are not met, the tax preparer does not guarantee submission of the tax return by the IRS deadline. In the event the Client discovers that they failed to provide all documentation and the tax return has already been completed, a fee will be assessed (hourly consulting rate) to make the necessary changes. If the Client's discovery is made following the filing of said tax return, an amendment tax return will be required to include the additional information. A charge of 50% the original tax preparation fee + any necessary paper filing fees will be assessed for amendments.

While the Tax Preparer keeps records in accordance with IRS standards, the Client is responsible for retaining their own records as they relate to the Tax Return in the event of an IRS audit. This includes copies of all relevant end-of-year tax documents provided to the Preparer as well as proof of income and expenses included in the Tax Return.

6. Digital Communication

Client consents to be communicated with via e-mail, primarily. The Tax Preparer will not text or call the Client unless in the event of emergency, urgency, or advance scheduling. Any sensitive Taxpayer documents and information must be shared via our secure portal (Verifyle). If the Client shares documents or sensitive information with Artist Tax Prep via e-mail or text, rather than by using our secure online portal (Verifyle), the Client is risking their data security. Client consents to the use of electronic signatures and electronic delivery of documents. We will not physically mail documents unless required by the IRS/state. Client consents to occasional e-mail communication outside of tax preparation, including updates and resources.

SPECIAL DIRECT DEPOSIT NOTE FOR 2025 TAX RETURNS AND BEYOND

With very limited exceptions, the IRS is no longer issuing paper checks and you will no longer have the option to receive your refund as a paper check in the mail. If you do not provide Artist Tax Prep with direct deposit information (an image of a blank & void check, a direct deposit form from your bank, or Artist Tax Prep's direct deposit form are all acceptable), it is unclear exactly how and when you would receive a refund. Likely - without direct deposit - your refund will be delayed and you will need to provide additional information to the IRS.

You can still pay your balance owed to the IRS via paper check for this year only. Online IRS payments are always accepted. We recommend choosing auto-debit in the event you have tax due to the IRS/state(s) and have the funds available.

Up to date information on the IRS paper check policy can be found here:
<https://www.irs.gov/newsroom/questions-and-answers-about-executive-order-14247-modernizing-payments-to-and-from-americas-bank-account>