

# JOSHUA DUVALL

## Financial Planning & Accounting

### TAX RETURN PREPARATION & PLANNING AGREEMENT

Outlined below is a service agreement between Joshua Duvall, CFP®, RTP (tax preparer), and you (client, customer, tax payer).

**1. Joshua Duvall, CFP®, RTP will perform the following services:**

- a. Engage you in a brief consultation to assess the most economical filing method, with the greatest benefit to you.
- b. Complete a federal tax return (1040, 1040ez, 1041, 1120, 1120s, or 1065).
- c. Complete the applicable state return(s).
- d. Review all documents received and analyze the potential for attaining more deductions and credits.
- e. Prepare your return to be e-filed with the IRS and applicable state.
- f. Discuss your prepared return with you prior to filing the return.
- g. Present a completed analysis and recommendation for the following year to maximize your tax return in the following year.
- h. Ongoing planning clients will receive tax planning & advice throughout the year in coordination with other financial planning discussions.

**2. Representation:**

- a. Joshua Duvall, CFP®, RTP is not legal counsel and does not speak with the IRS on your behalf.

**3. Delivery of Completed Tax Return:**

- a. Completed tax returns (or a copy) will be provided following full payment of services rendered.
- b. The Customer will receive PDF version of tax return copy.

**4. Security:**

- a. Joshua Duvall, CFP®, RTP will take every reasonable precaution to safeguard clients' information and prevent identity theft, including encrypted digital storage, password protected devices, and secure wifi networks.

**5. Payment of Services Rendered:**

- a. Payment is due in full at the completion of services rendered, prior to actually e-filing the return.
- b. Payment for services rendered is due on all completed tax returns whether the client is to receive a refund or not.

**6. Client's Responsibilities/Amendments:**

- a. Joshua Duvall, CFP®, RTP is not responsible for returns completed with inaccurate or missing documentation. It is the clients responsibility to maintain all documentation and records of tax return related information for future reference or audit. The client will hold harmless Joshua Duvall, CFP®, RTP, for any and all errors related to missing or inaccurate information.

Please acknowledge that you have read and agree to the terms and conditions above.

Name: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_