

Terms & Conditions



RELIABLE NUMBER
MANAGEMENT

- By submitting your information to us for your tax return preparation, you have engaged our services, we have established a valid contract, and you are agreeing to the policies and procedures outlined here.
- It is your responsibility to provide all the information required for the preparation of a complete and accurate return. You should retain all the documents, canceled checks, receipts, and other data that form the basis of income and deductions for 3 years from the due date of the tax return (or better yet 6 years). These may be necessary to support items contained in the tax return in the event of an inquiry by a taxing authority.
- We will not audit or otherwise verify the accuracy or completeness of any information you submit, although it may be necessary to ask you for clarifications. Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcation or other irregularities, should any exist.
- During the tax preparation process, we try to make sure that we have everything pertinent to your situation. We do this by comparing your current tax return to last year's tax return, inquiring about pieces that appear to be missing, sending periodic reminders, and other methods. However, ultimately it is up to you to make sure we have all necessary information and to follow up as needed. It is also important to note that legally you are responsible for what is on your tax return, so even though we always do a thorough, professional job, it is important to review the numbers reported on your return. You have the right to ask us about anything that appears on the return or is used in the calculations.
- While we are generally able to provide services in an expeditious manner, we make no guarantees regarding the timing of communication, completion of work, or meeting deadlines. It is your responsibility to provide your information to allow sufficient time to complete the process and to follow up with us, if necessary.
- If you decide to discontinue using our services before the tax return is completed, or if you elect not to use the completed return, fees for work performed will still be due.
- Fees for preparation of a tax return are due when the final draft (subject to client review) is finished. We will inform you of this with a "Return Ready" email. Payment should be made within a week of receiving this email. Additional fees may apply under certain circumstances.
- Concerns with the results (refund or tax due) are not grounds for withholding fee payment. Rest assured there will be ample time and opportunity to address and resolve them during the review process, which will take place immediately after we have sent you your Return Ready email. Always keep in mind that your return is never final until you have given your signature authorization on the e-file forms or the tax return itself, so changes can still be made if need be.

Limitations of Scope & Responsibility

- Our responsibility is to prepare your tax return as accurately as possible. Once it is filed, while we can make corrections or amendments as needed, we are not responsible for the actions of the tax authorities.
- Regarding consultations, our scope is limited to the questions specifically asked. We do not provide updates or predictions of future events.