



MINIMUM TAX PREPARATION FEE ACKNOWLEDGMENT

First Rate Taxes | info@firstratetax.com | 877-267-6118

Minimum preparation fee

\$300

Why this form matters

The minimum fee for tax preparation is \$300. This fee pays First Rate Taxes for reviewing my documents, preparing my tax return, and completing the filing work.

What I agree to

I agree to pay the \$300 minimum fee for the work First Rate Taxes performs. I must still pay this fee if I later find out that I owe the IRS or a state tax agency.

I must also pay the fee if my refund is smaller than expected, I receive no refund, or the IRS or another agency takes part or all of my refund to pay an old debt. First Rate Taxes does not promise a refund amount. Any taxes, interest, penalties, or old debts I owe are separate from the preparation fee.

How the \$100 consultation credit works

If I paid \$100 for a consultation, First Rate Taxes will apply that \$100 toward my preparation fee only if I hire First Rate Taxes to prepare my return. I will not receive the credit if I use another preparer or decide not to move forward.

My agreement

By signing below, I confirm that I read this form, understand it, and agree to these terms before tax preparation begins.

Client name: _____

Tax year(s): _____

Client signature: _____

Date: _____

Please keep a copy of this form with your tax records. This form works together with any other tax preparation agreement you sign.