

Dear Valued Client:

Thank you very much for choosing our firm for your professional services.

With over 90 years of combined experience, we have dedicated our firm to those that choose to work with us, and we are honored that you have done that. As a firm, we strive to provide the best advice and service in the most efficient way possible. For you that means access to us at any time, resources always just a click away on our website, tax newsletters that make sense, and a blog with real information that can be used by real taxpayers; not regurgitated court cases and confusing code references that only apply to big corporations. We make every attempt to return e-mails and phone calls within 24 hours and if we do not know the answer to your question, we will find out the answer and provide the sources so you can confirm the advice that has been given. So, thank you again for your trust in us and we are look forward to building our relationship over the years to come.

Included in this packet is a *Client Information Sheet* that needs to be completed and returned. These items are necessary to start your file and they give us the foundation of the work we will perform for you this tax year. Once you have completed the *Client Information Sheet*, signed the *Letter of Expectations*, and completed the payment authorization form we can begin to address your most pressing tax and finance issues.

As always, if you ever have any questions or concerns, please feel free to call our office at any time or shoot us an email. We look forward to meeting with you soon.

Very truly yours,

Crace.CPA



Jason L. Crace, CPA
Principal & Founder
jason@crace.cpa

Once you have completed the entire packet, answered all questions, signed where necessary and are ready to submit the packet, please send it to us electronically.

Individual Information

Taxpayer _____

Spouse _____

Address _____

City _____ ST _____ Zip _____

TP _____ DOB _____

Cell _____ SSN _____

SP _____ DOB _____

Cell _____ SSN _____

Services requested (check all that apply):

Tax planning Other _____

Tax preparation _____

Bookkeeping

Payroll

New business entity

Litigation support

Referred by: _____

Please upload the following items to your client portal prior to your initial meeting

- 2 years personal tax returns
- 2 years business tax returns
- Depreciation schedules
- QB File/QBO Access
- Shareholder/partner basis schedules

Business Information (if applicable)

Name _____

Officer _____ EIN _____

Address _____

City _____ ST _____ Zip _____

Tel _____ Fax _____

http:// _____ # Employees _____

Entity _____ Form _____

Prior CPA _____ Tel _____

Attorney _____ Tel _____

Advisor _____ Tel _____

If you do not have an advisor or attorney, may we refer one to you? Yes _____

No _____

Letter of Expectations

Dear Client:

A professional service provider is only as good as the expectations that they can fulfill. As our firm grows, we are constantly striving to provide the best service possible. To make sure that your experience as a client is the best it can be, we have put together this letter of expectations. This letter covers both the expectations that you should have of us, and the expectations we have of ourselves as professionals.

What can you expect from us?

Integrity

To us, integrity means that we will meet our professional responsibilities in an ethical and objective manner. We have a responsibility to adhere to an industry specific code of ethics. We will work as hard as we can to complete your project, minimize your taxes, and look out for your financial wellbeing in an objective manner. We will advise you of options and risks when appropriate, but our personal opinions will not cloud our judgment. We will never break the law to achieve an unjustified result. You can expect all of us to be upstanding citizens and supporters of our community and our fellow man, woman and child.

Quality

Quality can address things other than the work we do and present to you. It also defines the environment that we work in and the tools that we provide to our professionals, so they can do their best job. We will always have a clean, safe work environment for both our staff and our clients. In addition to that, we will make sure that any time we spend on your account, whether in person, on the phone, or remotely, will be quality time. The time will be spent efficiently, and we will make every effort to get the job done right the first time. We cannot guarantee you that mistakes won't be made, but we assure you we will work with you to make it right if a mistake occurs.

Responsiveness

There is nothing more frustrating than trying to obtain help from a professional that never checks their email or returns phone calls. We understand that you are trying to make a decision or gain a better understanding of a situation that affects you. Our responsiveness reflects on our commitment to doing the best work that we can. Our office policy is to return all phone calls and emails within a 48-hour period. We are all busy and we all have lives outside of the office but being available to our clients in a responsive manner is the crux of the livelihoods we are all trying to achieve.

Fair fees

In all instances, no matter what you have tasked us to do, we will be prepared to give you an honest, straight answer on what the cost of that service will be. We do not nickel and dime our clients for minor calls or faxes. Over the last few years, we have worked hard to put together a fee schedule that defines an extensive list of services that we provide along with a fixed fee that will be charged for that service. This gives both you as the client, and us as the provider, an assurance that there are no time constraints on doing what is necessary to complete the job timely and correctly. It also eliminates the surprise of large bills based on time expended and unforeseen circumstances. While we may not be the cheapest firm in town, we believe that our values exceed those of our competitors. We are flexible. If for any reason, you cannot pay your fees at one time, then a simple call to us for a payment plan is all that is necessary. No finance charges will apply to those clients that arrange terms on the payment of their account.

Confidentiality

Your privacy is one of our biggest concerns. We have invested in cloud-based services that ensure your sensitive data is safeguarded. All of our communications are considered confidential and only you and our staff will have access to any of the electronic portals that have been established to streamline our services. We protect your data without regard to cost or convenience.

Professionalism

Keeping cool under pressure is important. No matter what the situation we encounter, we will always act professional with you and amongst ourselves. You and your account will always be treated with respect and poise, regardless of the subject or the monetary value of your account. In addition, we treat every individual, whether that be a client, employee, colleague, family or friend, with dignity regardless of their age, gender, race, religion, or sexual orientation. We cultivate a culture of inclusiveness and our professionals are encouraged to grow and learn both technically in their duties and spiritually in their lives.

On the other hand, providing you with the best service is often a two-way street. The bigger the road and the higher the speed limit, the quicker and smoother that your needs can be fulfilled. So, this letter will also define the expectations that we have of our clients. Over the past 21 years, I have learned that when both parties are working together to achieve the same goal, incredible results can be accomplished.

What do we expect from our clients?

Integrity

As a client, your integrity is as important to us as it is to your employer, your business or your family. We expect you to understand and respect the industry specific code of ethics that we must adhere to. We want to work with people who are as concerned about their own wellbeing as we are of yours. It also means that you are an integral part of the professional service relationship. When communicating with us, be honest about your financial health including any mistakes you may have made.

We all work as hard as we can, given the time of the day, the resources at hand, or the constraints we face. We expect you to accept that and not be judgmental about us as professionals, people, or what we do outside of work time. We are all fathers, mothers, brothers, sisters, sons and daughters to someone. Show us the same integrity that you would show to your own family.

Responsiveness

While it is important for us to respond to your needs in a timely fashion, your timely responses to our inquiries or requests for information directly affect the job we are trying to complete on your behalf. We expect you to be cognizant of tax return due dates or project deadlines that we have communicated to you. Please plan accordingly and give those inquiries a response as prompt as you would expect from us. We are accountants and CPAs, not miracle workers. If you know of an upcoming task or have received a letter from a taxing authority, getting the information to us as soon as possible gives us the time necessary to do the best job we can. We reserve the right to refuse work if your procrastination has hindered our ability to perform our job to the best of our ability.

Understanding

One of the most important values that we hold steadfast lies within our priorities. We will always place the well-being of our families, our God, and our country first, before all. Sometimes we have to take a vacation or tend to a sick spouse or child. We plan our work around these events, but the unexpected can occur – either an unforeseen event affecting one of our professionals or an urgent matter affecting a client. Because of this, we expect you to understand that these events can play a role in the timeliness of your work or the responsiveness of our response. Also, we expect you to understand that you are one of many clients. We do not play favorites and treat all of our clients with the same level of urgency and respect. In the rare circumstance we may need to place a client at the front of the line because of the urgency of the situation, please remember we will do the same for you should the need arise.

Respect

One of the most important things that we expect from our clients is a respect of our time and our expertise. Our time and expertise are the two things that distinguish us from lawyers, teachers, doctors and firefighters. A combination of those two things are the only way that enable us to make a living. If you take a substantial amount of our time or rely on our expertise as accountants and CPAs, then we expect you to understand that a charge will be applied. While we are here to serve your professional needs, we expect you to treat all of us, regardless of our job description or position within the firm, with respect and courtesy. No person is entitled to a higher level of respect than their coworker, whether it be the owner or the administrative assistant. In addition, disrespectful or vulgar language directed to any member of our firm will not be tolerated and our professional relationship will be terminated immediately.

Prompt payment

Just like you rely on your wages, your income, or the payments you receive from your customers to pay your bills, save for your retirement, or put your kids through college, the fees we charge are used to do the exact same. We all have costs of living, whether it be a mortgage, rent, car payment or other expense. We expect you to honor the terms that are presented on the invoices that you receive and pay us promptly and without hesitation so that we can meet our obligations. If you do not pay us promptly, then we expect you to understand that additional late charges will be applied and that we have the right to refuse to perform future work on your behalf. Also, we expect you to understand that we do not work for free. Just like you expect your employer or customer to pay you for the work you have done, we expect the same out of our clients. If you ask us to provide a service or interject our time and expertise, please expect a bill for those services.

Feedback

We expect you to tell us how we are doing. Whether that be good or bad, we expect you to tell us where we can improve our process, where we missed a detail or fact, and where we hit a home run and made your life a bit less “taxing” or your goals easier to achieve. People left without feedback have no way to gauge their performance. We expect you to help us understand where we can meet your expectations. By providing us with feedback, positive or negative, it gives us an opportunity to grow and recognize those people that deserve it.

With all of these expectations in mind, we believe that we can cultivate a professional relationship that will last for years. We are honored that you have chosen us to service your professional needs and are excited to show you just exactly how we can meet the expectations included here.

Very truly yours,

Crace.CPA



Jason L. Crace, CPA | Principal & Founder

I have read the Letter of Expectations and acknowledge the importance of the business relationship I hope to build with the professionals of Crace CPA, LLC. By signing below, I understand that the expectations I have of the firm go hand in hand with the expectations that they have for me as a client.

[Client Signature]

[Client Name]

[Date]

PLEASE NOTE: Over the past decade, the cost to accept credit cards has skyrocketed. In 2021 alone, the fees we paid to accept credits cards as a form of payment exceeded \$25,000. Funds of this nature could have been used to pay for additional benefits for our employees or hired an intern to learn more about our industry and practice. **As a small business, we are encouraging our clients to pay your invoices using a checking/savings account so that the payment can be processed as an ACH transaction.** By doing this, you will help us on our banking fees and contribute to the betterment of our office, our culture, and stick it to the big banks that certainly don't need the financial help.

If you would like to speed up the payment and tax return delivery process, please complete one of the payment methods below.

One (1) Time Charge -You authorize Crace CPA, LLC to make a one-time charge to your Credit Card or Bank Account listed below.

By signing this form, you give Crace CPA, LLC permission to charge your credit card of debit your bank account for the amount indicated on the invoice presented in advance. This is permission for a single transaction only and does not provide authorization for any additional unrelated debits or credits to your account.

Bank (ACH) Information

Checking Account

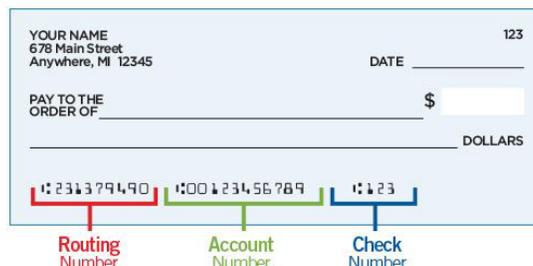
Savings Account

Name on Account _____

Bank Name _____

Routing Number _____

Account Number _____



Credit Card Information



Cardholder's name _____

Billing address _____

City _____ State _____ Zip _____

Credit card number _____

Expiration date (MM/YY) _____ Security/CVV code _____

I, _____ authorize Crace CPA, LLC to charge my Credit Card or Bank Account above for the fees associated with the preparation of my individual income tax returns for 2021.

I understand that this authorization will remain in effect until I cancel it in writing, and I agree to notify Crace CPA, LLC in writing of any changes in my account information or termination of this authorization at least 15 days prior to the anticipated billing date.

For ACH debits to my checking/savings account, I understand that because these are electronic transactions, these funds may be withdrawn from my account as soon as the above noted periodic transaction dates.

In the case of an ACH Transaction being rejected for Non-Sufficient Funds (NSF) I understand that the merchant may, at its discretion, attempt to process the charge again within 10 days, **and agree to an additional \$25 charge for each failed credit card attempt or ACH returned NSF which will be initiated as a separate transaction from the authorized recurring payment.**

I acknowledge that the origination of ACH transactions to any account must comply with the provisions of U.S. law and I certify that I am an authorized user of this credit card/bank account and will not dispute these scheduled transactions with my bank; so long as the transactions correspond to the terms indicated in this authorization form.

[Signature]

[Name]

[Date]