

# Service Agreement & Engagement Letter

*Fast Tax Works LLC (thefasttax.com)*

*Effective Date: December 23, 2025*

This Service Agreement & Engagement Letter (the "Agreement") describes the terms under which The Fast Tax ("Fast Tax," "we," "us," or "our") will provide tax preparation and related services to you ("you" or the "Client"). By signing below (or accepting electronically), you agree to these terms.

## 1. Parties and Contact Information

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

Client Email: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

Fast Tax Contact: \_\_\_\_\_ Email: \_\_\_\_\_

## 2. Scope of Services

The scope of services covered by this Agreement is limited to what is selected below (the "Services").

- Individual Tax Return Preparation (Form 1040 and related schedules) for Tax Year \_\_\_\_\_
- State/Local Return Preparation (as applicable): \_\_\_\_\_
- Business Return Preparation (if applicable): ☐ 1065 ☐ 1120 ☐ 1120-S ☐ Other: \_\_\_\_\_
- Tax Extension Preparation (federal/state)
- Amended Return Preparation (Form 1040-X or business amendment)
- Estimated Tax Planning / Quarterly Estimates
- W-4 / Withholding Guidance
- ITIN Assistance (Form W-7)
- Bookkeeping / Accounting Support (if applicable): \_\_\_\_\_
- Notice Support (responding to IRS/state letters) (see Section 8)
- Other: \_\_\_\_\_

Any services not listed above are outside the scope of this Agreement unless we agree to them in writing.

## 3. Service Standards and No Guarantees

We will use reasonable care and professional judgment to prepare your tax filings based on the information you provide and applicable tax laws and guidance. You understand and agree that:

- We do not guarantee any specific tax outcome, refund amount, tax liability, or processing speed.
- No tax preparer can prevent an audit. Audit selection and processing times are determined by the IRS and state agencies.
- Tax outcomes depend on your facts, documentation, and the positions taken on the return.

#### 4. Client Responsibilities

To perform the Services, you agree to:

- Provide complete, accurate, and timely information, including all income documents (e.g., W-2, 1099), expense records, and other relevant tax documents.
- Review drafts and questions promptly and notify us of any missing or incorrect information.
- Maintain your own records and supporting documentation. You are responsible for the underlying accuracy of the information provided.
- Keep copies of your filed returns and supporting documents for your records.
- Inform us of any changes in your personal, business, or tax situation that may affect your filing.

Delays or incomplete information may affect our ability to meet filing deadlines or may require extensions.

#### 5. Deadlines and Extensions

You are responsible for meeting filing and payment deadlines. We will make reasonable efforts to file on time if you provide complete information by the deadlines we request. If information is not received in time, we may recommend filing an extension. An extension provides additional time to file, not additional time to pay.

#### 6. Fees, Billing, and Payment

Fees may be based on forms, complexity, time, and services selected. Your estimated fees are:

Estimated Fee: \$\_\_\_\_\_ Deposit (if any): \$\_\_\_\_\_ Balance Due: \$\_\_\_\_\_

Billing arrangement (check one): ☐ Flat fee ☐ Hourly (\$\_\_\_\_/hr) ☐ Per-form pricing ☐ Other:

\_\_\_\_\_

Payment terms:

- Payment is due prior to e-filing unless otherwise agreed in writing.
- Additional fees may apply for out-of-scope work, late changes, additional forms, notice support, or expedited requests.
- If third-party fees apply (e.g., payment processing), they may be passed through to you where permitted.

## **7. E-Filing and Electronic Signatures**

If we e-file your return, you must review the final return and authorize electronic filing. For many individual returns, this includes signing Form 8879 (IRS e-file signature authorization) or another required authorization. We will not e-file without your authorization.

## **8. IRS/State Notices and Representation**

Our standard tax preparation Services do not automatically include representation before the IRS or state agencies. If you receive a notice, you should send it to us promptly. Notice support may be available as an add-on service.

Representation and information access may require separate written authorization, such as:

- Form 2848 (Power of Attorney and Declaration of Representative)
- Form 8821 (Tax Information Authorization)

Whether we can represent you may depend on the nature of the matter and whether a credentialed professional is required.

## **9. Use and Disclosure of Tax Return Information (IRC §7216)**

Federal law may restrict a tax return preparer's use and disclosure of tax return information. We use your tax return information to provide the Services. We will not use or disclose your tax return information for other purposes unless permitted by law or you provide written consent when required.

If we need to share your tax return information with third parties (for example, certain software providers, e-signature tools, secure portals, or other vendors) to deliver the Services, we will do so under confidentiality and security obligations and, where required, obtain your consent.

## **10. Confidentiality, Privacy, and Security**

We treat your information as confidential and use safeguards designed to protect it. Please review our Privacy Policy for more information on how we handle personal information.

You are responsible for maintaining the confidentiality of your login credentials and for using secure devices and networks when accessing your account and uploading documents.

## **11. Record Retention**

We may retain copies of returns, workpapers, and related records for a period consistent with our internal policies and applicable legal or regulatory requirements. You should retain your own copies of tax returns and supporting documents for as long as needed under applicable law.

## 12. Limitation of Liability

To the fullest extent permitted by law, Fast Tax's total liability for any claims arising out of or relating to the Services will not exceed the fees you paid for the specific Services giving rise to the claim. We will not be liable for indirect, incidental, special, consequential, or punitive damages. We are not responsible for penalties, interest, or adverse outcomes resulting from incomplete, inaccurate, or late information provided by you.

## 13. Dispute Resolution

If a dispute arises, the parties agree to first attempt to resolve it informally by contacting the other party in writing. If not resolved, the dispute may be handled through mediation or other alternative dispute resolution as permitted by law.

Governing law (fill in): State of \_\_\_\_\_ (default: state where Fast Tax is located).

## 14. Termination

Either party may terminate this Agreement upon written notice. You are responsible for fees incurred up to the date of termination. If termination occurs before filing, you remain responsible for meeting any tax deadlines.

## 15. Changes to This Agreement

We may update this Agreement from time to time for future services. Any changes will be effective when posted or when provided to you and accepted for new engagements. This Agreement applies to the Services described in Section 2 unless replaced by a new written agreement.

## 16. Signatures

By signing below (or accepting electronically), you acknowledge you have read and agree to this Agreement.

Client Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Client Printed Name: \_\_\_\_\_

Fast Tax Authorized Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name/Title: \_\_\_\_\_