**Our Commitment To You**

* Have integrity and always work in your best interest

Care about you, your family, your tax situation and financial affairs

Ask questions and listen well to truly understand your needs and goals

Consistently provide high-quality service

Be a catalyst to assure that important tax and accounting matters are taken care of and addressed

Provide our professional expertise and experience, and stay current on changes in the tax world that you don’t have time to keep up with

Offer to share tax tips and answer your questions in a timely manner

Explain your tax situation and become your tax educator and help you to become an informed decision maker as it pertains to your personal and business financial affairs

Help you reduce your taxes and stay compliant with the taxing authorities

Coordinate with your other advisors when applicable

Offer you monthly, quarterly and/or year-end tax planning **with separate charges**, when desired

Return your phone calls, emails and texts as soon as possible (within 48 hours)

Utilize all our available resources to best handle your concerns, questions, and requests

Be an advocate for you

Make sure your tax returns are filed with the highest level of accuracy yielding the best tax outcome

Serve as your tax advisor and CPA for the long-term

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**Client ExpectationsXPEC**

**TATIONS FOR OUR CLIENTS**

You laugh at our jokes

You call ahead of time if a cancellation is necessary

You do your best to come prepared with necessary documentation

You do your best to provide the requested documents within a reasonable period of time (72 hours or less depending on the urgency of the matter)

 You let us know of any significant changes in your life as it pertains to your tax situation or income level

You refer to us for consultation and advice **before** making any significant financial decision

You disclose to us all sources of income (including cash) and make sure to separate personal from legitimate business expenses

Return our calls, texts and emails as soon as possible (within 48 hours)

You mostly follow our recommendations and tax advice

You agree to pay our professional fees in full in a timely manner (before the filing of your tax returns or in installment payments throughout the year, whichever you prefer).

Provided we meet your expectations by providing a memorable experience, you recommend us and let us provide the same service to those you care about

CPA Signature: Taxpayer Signature:

Date: Date: