

Eric Scott, Inc
FINANCIAL SERVICES AGREEMENT

This agreement, made this ____ day of _____ in the year _____, by and between _____, hereinafter called "Client" and Eric Scott, Inc hereinafter called "ES".

1. ENGAGEMENT and DUTIES:

- a. ES offers bookkeeping, tax preparation for federal and state returns, income statements, budgeting, preparation of quarterly estimated tax vouchers, and other financial consulting.
- b. Client hereby engages ES to provide services described above starting at the date of this document.
- c. ES may continue to prepare tax returns annually for client, prepare quarterly estimated tax payments based on the information that the Client furnishes ES, or any other service ES customarily provides.
- d. ES is authorized to file a tax extension for Client for any suitable reason, especially if documents are not received in a timely basis by ES.

2. PAYMENT AND FEES:

- a. ES is authorized to collect usual and customary fees for providing this service based on their published fee schedule. Payments may be made via cash, check, credit card, or other electronic process.
- b. Fees will be collected on a periodic basis, typically monthly, quarterly, or annually.
- c. Client agrees to pay for tax preparation services in advance.
- d. ES is authorized to collect hourly fees for additional services completed for the client's behalf.

3. DUTIES AND RIGHTS OF CLIENT:

- a. Client agrees to furnish accurate, complete, and timely settlement, tax, and financial data to ES.
- b. Client agrees to allow ES to gather settlement, tax, and any other relevant information with the company for which the client provides services, provides any financial services, or finances the client's equipment. Client agrees to allow ES to share monthly operating statements with any third party at the direction and consent of client.
- c. Client agrees ES may access client information online or through third parties at the direction and consent of client.
- d. ES may ask for more information or documentation, and Client will provide such information.
- e. Client will be treated fairly, and ES will try to resolve tax matters in the client's favor when practical and prudent.
- f. Client agrees to review each document and tax return completely before signing. The client is reminded that the law imposes a penalty if a taxpayer makes a substantial underpayment of tax liability. Client is ultimately responsible for such filings and payments
- g. Client may discontinue service at any time giving 30 days written notice. Fees will be charged until discontinuation of service. ES may charge a \$150 closing account fee if needed to recoup time for setup, record keeping, marketing, or other expenses.

4. MISCELLANEOUS:

- a. Client acknowledges that ES's liability for damages under this agreement shall not exceed the total fees paid by client, and ES will be released and indemnified from any future liability.
- b. ES may discontinue service to Client for any reason, and return documents and information to Client in a timely manner.
- c. All questions of law and interpretation of this agreement shall be governed and construed in accordance with the laws of Colorado.
- d. This agreement may be amended or modified in writing with the mutual consent of the Client and ES.
- e. Eric Scott will maintain files related to this engagement that we, in our sole professional judgment, determine are necessary for the conduct of this engagement. During the period in which we maintain the files, you may request to examine the files, and to copy documents in the files. Client is required to request any documents not returned to them within once year after the engagement ends. Otherwise ES may destroy the files according with our records retention policy.
- f. This Agreement constitutes the sole agreement of the parties and supersedes any prior understandings, or written, or oral agreements between the parties respecting the subject matter of this Agreement. No modification of this agreement shall be effective unless in writing, and signed by ES. The parties agree that fax signatures are legally binding in accordance with this Agreement.

Client Printed Name

Client Signature Date

Company Name

Phone:

Mailing Address: _____
Street Address City State Zip

Home Phone (____) ____ - ____ Cell Phone (____) ____ - ____ Tax ID/SSN ____ - ____ - ____
Social Security Number

To begin benefiting from these services please complete this form and **FAX** back to **720-222-3765**

We appreciate the opportunity to serve you.