



PREMIER  
ACCOUNTING  
& TAX LLC  
SETTING THE BAR

## WELCOME TO PREMIER ACCOUNTING & TAX

We would like to take this opportunity to thank you for considering Premier Accounting and Tax. We appreciate your business! We would like to warmly welcome you as a new client of our company. We would love to help you with your accounting and tax needs. If you haven't already, please reach out to us as soon as possible to get onto our schedule to make sure that we can help you. Tax season is very busy and we have limited space; therefore, getting on our calendar now is important!

Please be aware that the work on your return will not begin until all of the required documents are provided. The options available to you at this time are as follows:

1. You can schedule an appointment and come in to sit down with a preparer to go over your documents. We do offer a discount for drop-offs.
2. You can drop them off at our office with our receptionist. We do offer a discount for this and will call you if we feel like you need to come in for an appointment.

We do charge a \$125.00 consultation fee when you schedule your appointment. We also require a non-refundable \$50.00 deposit for new drop-off clients. Consultation fees and deposits can be applied to your total bill if you retain our services.

Once again, we would like to thank you for choosing Premier Accounting and Tax and look forward to working with you on all of your accounting and tax needs.

# **2024 PRICE LIST**

\*All prices include one (1) state return\*

Each additional state + \$50.00

\*\*New Clients - \$50.00 'up front' deposit\*\*

1040 - \$325.00  
w/EIC +\$25.00  
w/CTC/ACTC +\$50.00  
w/Education credits +\$25.00  
w/1095-A or premium tax credit calculation +25.00  
w/Sch A +\$50.00 and up  
w/Sch B +\$15.00 and up  
w/Sch C +\$100.00 and up (depends on complexity)  
w/Sch D +\$100.00 and up (depends on complexity)  
w/Sch E +\$25.00 and up (each property, depends on complexity)  
w/Sch F +\$50.00 and up

All other work is priced based on an as needed basis.

1041 - \$300 and up (estate return)  
990 - \$400 and up (non-profit return)  
1065 - \$900 and up (partnership return)  
1120 - \$900 and up (corporation return)  
1120S - \$900 and up (corporation return)  
709 - \$300 and up (gift return)  
W4 - \$25  
Amendments \$100 and up

## **Bank Products**

You can choose to have a direct deposit or a check in the office.

The bank charges an additional **\$109.95**

## **Bookkeeping**

Monthly \$200  
Quarterly \$575  
Yearly \$2,100

## NEW CLIENT ENGAGEMENT LETTER

Date: \_\_\_\_\_

Taxpayer Name: \_\_\_\_\_

Spouse Name: \_\_\_\_\_



Subject: Preparation of your \_\_\_\_\_ Tax Returns.

Thank you for choosing Premier Accounting & Tax LLC to assist you with your 2023 taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your 2023 federal and state income tax returns. We will depend on you to provide the information we need to prepare a complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. We can provide an Organizer to help you collect the data required for your return. The Organizer will help you avoid overlooking important information. By using it, you will contribute to the efficient preparation of your returns and help minimize the cost of our services. Your cooperation and timeliness are essential in order for us to complete this engagement. It may be necessary to prepare an extension to file your tax return when we do not receive all necessary tax information 30 days prior to the due date of your return. Applying for an extension may extend the time available for a taxing authority to audit your return or may extend the statute of limitations. An extension only allows additional time to file a return, it does not extend the time to pay any taxes that are due.

We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will inform you of any material errors, fraud, or other illegal acts we discover.

The law imposes penalties when taxpayers underestimate their tax liability. Call us if you have concerns about such penalties.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select. The Internal Revenue Code and regulations impose preparation and disclosure standards with noncompliance penalties on both the preparer and the taxpayer of the return. Unless the preparer has reasonable belief that any tax position in the return will more likely than not be sustained on its merits, a preparer penalty will be imposed unless that position has a reasonable basis and is adequately disclosed by adequately disclosure on Form 8275. While the

preparer may avoid being penalized by disclosing this position, the taxpayer may not have to disclose the position in order to avoid applicable taxpayer penalties. If we determine we may be subjected to a penalty, you agree to either adequately disclose the position on the return or change the position to one that would not subject us to penalty. If you choose not to change your position, we, in our sole discretion and at any time may withdraw from the engagement without completing or delivering tax returns to you. Such withdrawal will complete our engagement, and you will be obligated to compensate us for all time expended and to reimburse us for all out of pocket expenses through the date of our withdrawal.

Our fee is based on the time required at standard billing rates plus out-of-pocket expenses. Invoices are due and payable upon presentation. All prices reflect a 2.3% cash and check discount. Prices listed in office reflect cash and check price. The purpose of this non-cash adjustment is to incentivize clients to pay with cash or check. This is an “in-kind incentive” in compliance with section (2)(A) of the Durbin Amendment, a provision of the United States Federal Law, 15 U.S.C and 169o-2. We further provide a cash/check discount from the regular price in accordance with section (4)(c)(4) of the same document, and 2022 Georgia Code Section 13-1-15. All accounts not paid within thirty (30) days are subject to interest charges to the extent permitted by state law. Our minimum fee for an individual tax return is \$325 and is due even if you elect not to file the return we prepared. All non-sole proprietorships are subject to the new Beneficial Ownership Information Report as required by the Corporate Transparency Act. Our tax preparation fees do not include this report and will be subject to additional fees.

Our maximum liability to you arising for any reason relating to the services rendered under this engagement letter shall be limited to the amount of fees you paid for these services. In the event of a claim by a third party relating to the services under this letter, you will indemnify us from all such claims, liabilities, costs and expenses, except to the extent determined to have resulted from our intentional or deliberate misconduct.

You should retain all documents and data that form the basis of income and deductions as these may be needed to prove accuracy and completeness of your returns. You have the final responsibility for reviewing, signing, and sending in your return to the applicable taxing authorities.

We will return your original records to you at the end of this engagement. Store these records, along with all supporting documents, in a secure location. We retain copies of your records and our work papers from your engagement for up to seven years, after which these documents will be destroyed.

If your return is selected for audit by the IRS or by the state tax authorities, I am available to represent you or to prepare the materials in response to correspondence. However, these are additional expenses not included in my tax preparation fees and I will render additional invoices for the time and expense incurred. Please let me know right away if you receive any letters from taxing authorities. I will correct your return for free and pay any penalties if I am at fault. However, I am not responsible for any taxes owed.

If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them. Our engagement to prepare your 2023 tax returns will conclude with the delivery of the completed returns to you, or with e-filed returns, with your signature and our subsequent submittal of your tax return.

This agreement may not be modified or amended except by written agreement signed by all of the parties. In the event that any term or provision of this agreement is determined by a court or competent jurisdiction to be illegal, invalid, or unenforceable for any reason whatsoever, such illegality, invalidity, or unenforceability shall not affect the remaining terms or provisions of this agreement, which remaining terms and provisions shall remain in full force and effect.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, sign the enclosed copy of this letter in the space indicated and return it to us in the envelope provided.

Thank you for the opportunity to be of service. If you have any questions, contact our office at 770-251-0168.

Sincerely,

Premier Accounting & Tax LLC

(Both spouses must sign for preparation of joint returns.)

Accepted By:

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Taxpayer

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Spouse

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Date



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## PREMIER ACCOUNTING & TAX

8A FRANKLIN ROAD  
NEWNAN, GA 30263  
770-251-0168  
770-251-0061 FAX

### TAX PREPARATION ENGAGEMENT LETTER AND PRICE SHEET FOR THE 2023 TAX YEAR

PERSONAL TAX RETURNS START AT \$325

SMALL BUSINESS SCHEDULE C, E, F RETURNS START AT \$425

PARTNERSHIPS, CORPORATE AND/OR S – ELECTION CORPORATE RETURNS START AT \$900

\*ALL PRICES LISTED REFLECT OUR CASH/CHECK PRICE. OUR REGULAR PRICE INCLUDES A 2.3% NON-CASH/CHECK ADJUSTMENT.

Returns will not be released or e-filed without payment received in full. Fees are for the preparation of the return and are due whether you choose to file the return or not. Cash, check, Visa, MasterCard, Discover and American Express are accepted.

\_\_\_\_\_ Any tax information provided on or after **March 25<sup>th</sup>, 2024, will be automatically filed on extension.** We ask that you allow 2 weeks for us to complete your returns **from the date that the last document needed was received, not the date of drop off of the initial information.**

We are working on returns as quickly as possible. We will call you with any questions or concerns, or once the return is complete. If it has been longer than 2 weeks, please feel free to call and inquire about the status of your return. All tax returns are completed in the order we receive them.

Premier Accounting & Tax thanks you for your business and cooperation on these matters. You may submit your tax documents in person or on our secure portal. You may call or text 770-251-0168 or email [info@patnewnan.com](mailto:info@patnewnan.com) to set a tax appointment if needed.

Sincerely,

## Premier Accounting & Tax

Terms Accepted by (print name): \_\_\_\_\_

Signature: \_\_\_\_\_

Best contact number: \_\_\_\_\_

How would you like to receive a copy of your return? \_\_\_\_\_ Paper \_\_\_\_\_ Electronic

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### Office Use only

Sign in Date/Time \_\_\_\_\_ Checked-in by (initials): \_\_\_\_\_



2023 Tax Questionnaire

Client(s) Name: \_\_\_\_\_

Email: \_\_\_\_\_ Home Address \_\_\_\_\_

Home #: \_\_\_\_\_ Cell #: \_\_\_\_\_ Can we text you? Yes or No

Per new IRS security regulations, we must have a copy of both your and your spouse's Driver's license to file your tax return electronically. If it has not expired, we do not need a new copy.

If we have your bank information, write SAME or you may provide the following information:

Bank Name \_\_\_\_\_

Routing number \_\_\_\_\_ Account number \_\_\_\_\_

Please Circle your responses:

Did you receive a 1099K in 2023? Yes or No

Was anyone on your tax return pregnant in 2023? Yes or No

Did you have Marketplace Insurance? Yes or No Do you have your 1095A? Yes or No

Could another person claim any of the dependent children listed on your tax return? Yes or No

Have your dependents change from last year? Yes or No

Did all dependents live with you for all twelve (12) months? Yes or No

Do you have access to a foreign bank account? Yes or No

Did you receive or dispose of digital assets? (bitcoin, vbucks, etc.)? Yes or No

Did you give money to charity? Yes or No If yes, how much? \_\_\_\_\_

Do you have an LLC? Yes or No If yes, did you file your BOI report? Yes or No

Did you make any payments in 2023 that would require you to file Form(s)1099? Yes or No

Who would you like for us to call in the event that you need help gathering information for your taxes?

Name \_\_\_\_\_ Phone \_\_\_\_\_

Relationship \_\_\_\_\_

Taxpayer

Date

Spouse

Date



## Information needed from new clients to complete your 2023 tax return.

- 2023 Tax Questionnaire and Engagement Letter completed
- Copy of 2022 tax return
- Copy of Social Security card(s) and birth certificate(s)
- Copy of your and if applicable your spouse's driver's license also if applicable, identity theft pin(s),
- All income statements (W2, 1099's, retirement, dividends, interest, social security stmt, etc)
- 1099-B Proceeds from Brokerage accounts (If you have more than 20 stock trades, please give us this information in excel or another electronic format if possible)
- K-1 Forms (from corporations, partnerships, LLC, or estates)
- If self-employed we need record of income and expenses (spreadsheet available)
- If you own rental property, we need record of income and expenses (spreadsheet available)
- Other income (such as unemployment, gambling winnings, jury duty, prizes, awards, etc.)
- Home mortgage statements -Form 1098 (If funds were used for anything other than home purchase, please make a notation)
- Property taxes paid and Charitable Donations
- Marketplace Insurance (Form 1095-A)
- Form 1098-T and any other education expenses if you or any dependents attended post-secondary educational institutions
- Childcare expenses with name, address and tax ID number of childcare providers





# CLIENT PRICING NOTICE

## NOW OFFERING A CASH DISCOUNT!

PRICES LISTED IN OFFICE AND ONLINE REFLECT OUR CASH/CHECK PRICE. WE  
OFFER A SAVINGS AT THE POINT OF SALE WHEN YOU PAY WITH CASH!

**PAY WITH CASH & SAVE**

## THANK YOU FOR YOUR CONTINUED SUPPORT!

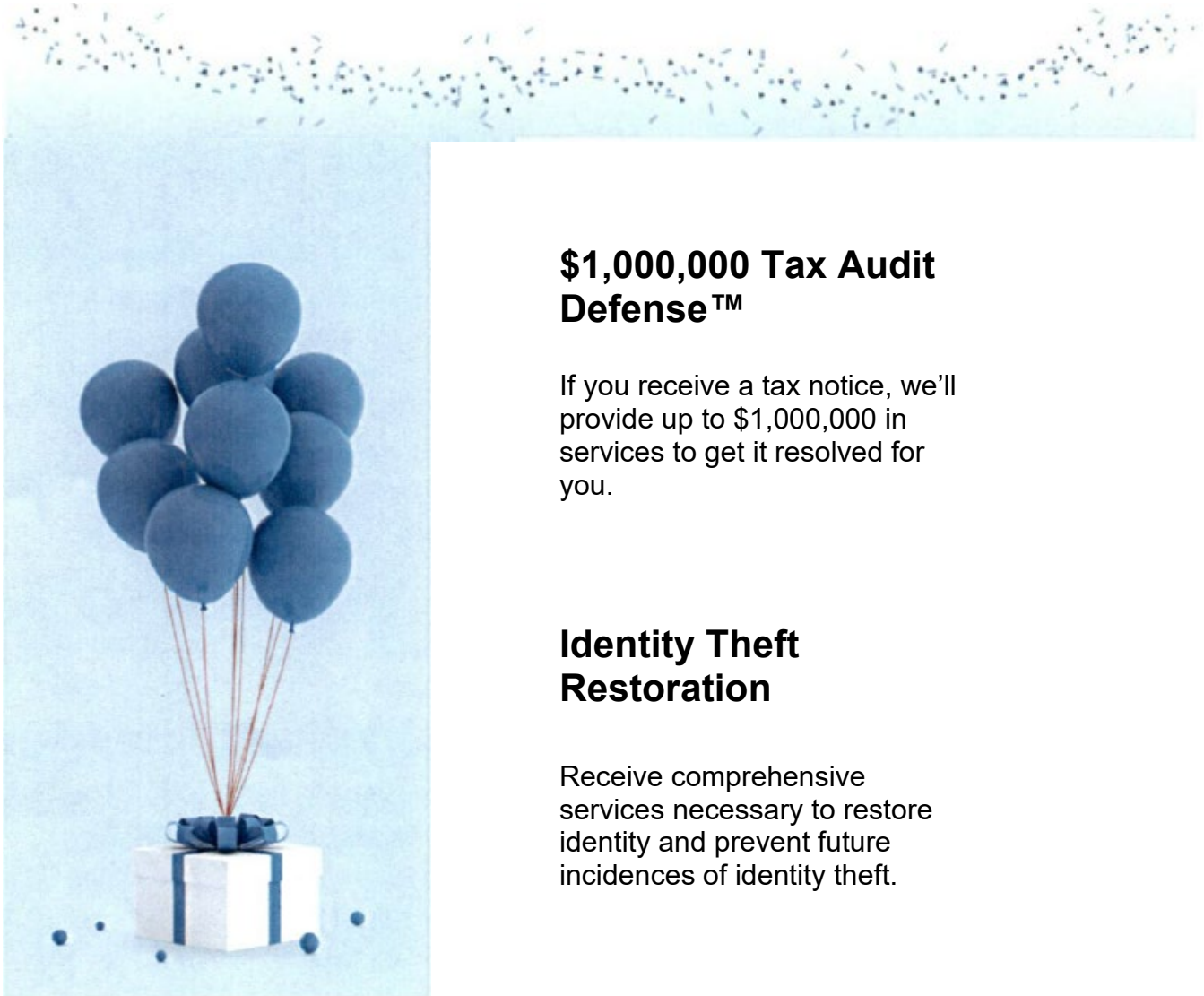
ALL PRICES REFLECT A 2.3% CASH AND CHECK DISCOUNT. PRICES LISTED IN OFFICE REFLECT CASH AND CHECK PRICE. THE PURPOSE OF THIS NON-CASH ADJUSTMENT IS TO INCENTIVIZE CLIENTS TO PAY WITH CASH OR CHECK. THIS IS AN "IN-KIND INCENTIVE" IN COMPLIANCE WITH SECTION (2)(A) OF THE DURBIN AMENDMENT, A PROVISION OF THE UNITED STATES FEDERAL LAW, 15 U.S.C & 1696-2. WE FURTHER PROVIDE A CASH/CHECK DISCOUNT FROM THE REGULAR PRICE IN ACCORDANCE WITH SECTION (4)(C)(4) OF THE SAME DOCUMENT, AND 2022 GEORGIA CODE SECTIONS 13-1-15. THIS SIGN IS MEANT TO INFORM CLIENTS OF OUR REGULAR PRICE IN COMPLIANCE WITH THIS LAW.



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## Enjoy Extra Perks When You File With Us!



### **\$1,000,000 Tax Audit Defense™**

If you receive a tax notice, we'll provide up to \$1,000,000 in services to get it resolved for you.

### **Identity Theft Restoration**

Receive comprehensive services necessary to restore identity and prevent future incidences of identity theft.