



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 charge a fee per appointment.
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 \$154.65 consultation fee when you schedule your appointment. We also require a non-refundable \$51.68 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.

2025 PRICE LIST

All prices include one (1) state return Each additional state + \$51.28

New Clients - \$51.68 'up front' deposit

1040 - \$358.98
w/EIC +\$25.64
w/CTC/ACTC +\$51.28
w/Education credits +\$25.64
w/1095-A or premium tax credit calculation +25.64
w/Sch A +\$51.28 and up
w/Sch B +\$25.64 and up
w/Sch C +\$102.56 and up (depends on complexity)
w/Sch D +\$102.56 and up (depends on complexity)
w/Sch E +\$25.64 and up (each property, depends on complexity)
w/Sch F +\$51.28 and up

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

1041 - \$410.26 and up (estate return)
990 - \$615.39 and up (non-profit return)
1065 - \$1,025.64 and up (partnership return)
1120 - \$1,025.64 and up (corporation return)
1120S - \$1,025.64 and up (corporation return)
709 - \$307.69 and up (gift return)
W4 - \$25.64
Amendments \$102.56 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 \$230.77
Quarterly \$666.67
Yearly \$2,461.54

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 2024 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 2024 federal and state income tax returns. We will depend on you to provide the information we need to prepare 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 that 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 adequate 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. Prices listed in office do not reflect our cash and check price. The purpose of this non-cash adjustment is to incentivize clients to pay with cash or check. Our cash/check discount is 2.5%. 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 \$358.98 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 2024 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 a 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:

Taxpayer

Spouse

Date



PREMIER ACCOUNTING & TAX

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

INFORMATIONAL NOTE AND BASE PRICE SHEET FOR THE 2024 TAX YEAR

PERSONAL TAX RETURNS START AT \$358.98
SMALL BUSINESS SCHEDULE C, E, F RETURNS START AT \$461.54
PARTNERSHIPS, CORPORATE AND/OR S – ELECTION CORPORATE RETURNS START AT \$1,025.64
ALL PRICES LISTED DO NOT REFLECT OUR CASH/CHECK PRICE. OUR CASH/CHECK DISCOUNT IS 2.5%

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.

_____ We ask that you allow us 3 weeks to complete your returns **from the date that the last document needed was received, not the date of drop off of the initial information.** If it has been longer than 3 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.

_____ Any tax information provided on or after **March 21st, 2025 may be automatically filed on extension. An extension is an extension of time to file NOT of time to pay.** If you do not pay the amount due on the returns original due date, you will owe interest on the unpaid amount. If your return goes on extension, we can guarantee that it will be completed by October 15th; however, it will not be completed in a timely manner as it is in the off season. During this time our team takes time for continuous learning classes, seminars, conferences and much needed time with our families.

Premier Accounting and 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 to schedule 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

Office Use only

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



2024 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? **Yes or No** Did you sell more than \$5,000 worth of tickets, goods, etc. in 2024? **Yes or No**

Was anyone on your tax return pregnant in 2024? **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 2024 that would require you to file Form(s)1099? **Yes or No**

Emergency contact that we can call to assist you with your taxes, that is **not** on your tax return:

Name _____ Phone _____

Relationship _____

Taxpayer

Date

Spouse

Date



INFORMATION NEEDED FROM NEW CLIENTS TO COMPLETE YOUR 2024 TAX RETURN.

- 2024 Informational Note
- 2024 Tax Questionnaire
- Engagement Letter completed
- Copy of 2023 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 2.5% 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 & 169_o-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. THIS SIGN IS MEANT TO INFORM CLIENTS OF OUR REGULAR PRICE IN COMPLIANCE WITH THIS LAW.

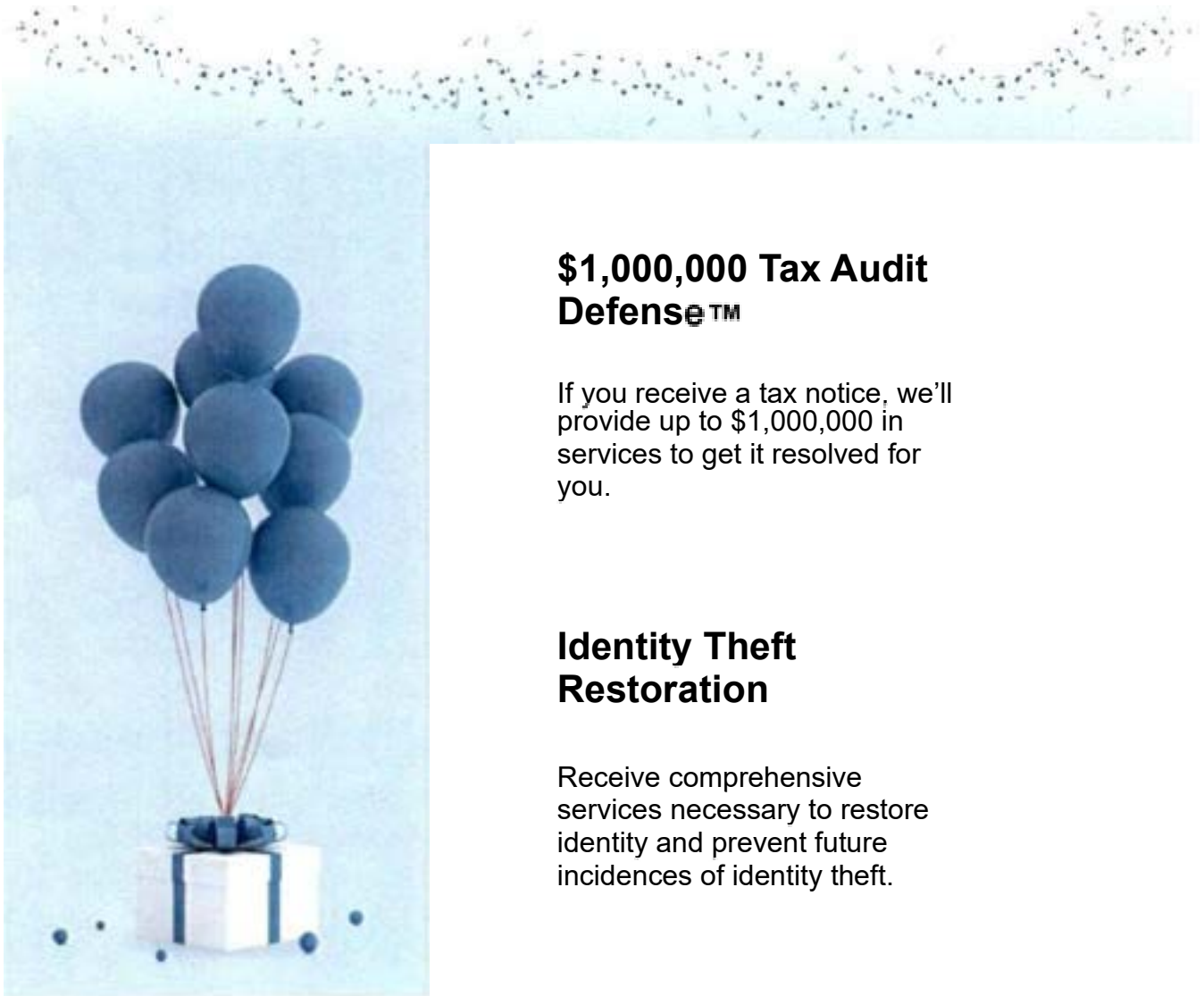


ProtectionPlus

\$1 MILLION

TAX AUDIT DEFENSE™

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.