

TAX PREPARATION SERVICE AGREEMENT

Between Veronique Colas, Tax Preparer

and Client _____

(Contains an Arbitration Provision)

Revised 10/23/25

Tax Year 2025

SERVICE AGREEMENT

We, _____, the undersigned, hereafter referred to as "Client", agree to the following tax preparation service agreement hereafter referred to as "Agreement" by Veronique Colas, hereafter referred to as "Preparer". For this service, the Client agrees to pay the fee below. This Agreement shall be governed by the laws of the State of California.

This Agreement is made effective as of the date signed below by the Client (if this is a Married Filing Jointly [MFJ] return, both spouses must sign and date this Agreement. Services will only begin and this Agreement will be in place only once both spouses have signed and dated this agreement).

DESCRIPTION OF SERVICES

Preparer will prepare Client's Federal and California State Income Tax Returns for the year specified above. It is the duty of the Client to obtain and provide all the information required for the accurate filing of the tax returns. It is the Client's responsibility to retain documents, canceled checks, receipts, and other relevant data that form the basis of income and deductions for at least the period of the statute of limitations (3 to 7 years, depending on complexity). Preparer will not verify all of the data Client submits; however, Preparer may ask Client to clarify or substantiate some of the information when necessary to accurately complete returns or when required by law. Preparer will be available to assist and guide Client

in gathering the necessary information by furnishing Client with questionnaires and worksheets, and by answering Client's questions. Documents necessary for the full and complete preparation of the tax returns include, but are not limited to, W2s, 1099s of any kind, 1098s, interest income, stock trades, rental gross income and expenses, and small business gross income and expenses. Since Client has the final responsibility for the information on his, her, or their tax returns, it is the duty of Client to review his, her, or their returns carefully before signing them.

If Client had virtual currency activity during the tax year, Client may be subject to tax consequences associated with such transactions and may have additional reporting obligations. Client agrees to provide Preparer with complete and accurate information regarding any transactions in, or transactions that have used, virtual currency during the applicable tax year.

Preparer will prepare Client's tax returns based upon information and representations that Client provides to Preparer. Preparer will retain Preparer's work papers and an electronic copy of Client's tax returns for seven years. All work will be done remotely and electronically.

If Client wishes to attend his or her tax preparation on Zoom[®], or be present on Zoom[®] to go over tax returns with Preparer, Client will inform Preparer and make an appointment. Client understands that Preparer's time is important, and therefore any appointment canceled and/or rescheduled less than 24 hours in advance, or any missed appointment (no show) will result in a \$30 cancellation fee added to the preparation total.

Preparer is entitled to receive a remuneration based on the standard billing rates. Billing will be based on an hourly rate of \$125, with a minimum of one hour billed per tax preparation, and exceeding time billed in increments of 15 minutes (that is to say, \$30 for each quarter hour past the first hour of tax preparation). By signing this Agreement, Client understands that some forms, such as Schedule E for rental properties, Schedule C for business, and Schedule D for capital gains and losses, are time-consuming forms and may require longer than an hour.

If the tax returns prepared in connection with this Agreement are filed using the Married Filing Jointly (MFJ) status, both spouses are deemed to be Clients of Preparer under the terms of this Agreement. Both spouses acknowledge that there is no expectation of privacy from the other concerning Preparer's services in connection with this Agreement. Preparer is at liberty to share with either of the spouses, without prior consent of the other, documents and other information concerning the preparation of their tax returns.

Preparer reserves the right to cancel this Agreement if the tax situation presented is too complex to be handled properly. Preparer will not prepare non-California state returns.

Prepared returns will not be released or electronically filed without full payment. Preparer will send an invoice when returns are ready to be filed. Forms of payments accepted by Preparer are money transfers through Zelle[®], CashApp[®], Venmo[®], or PayPal[®].

Preparer's engagement ends when Client has paid for services rendered and Client's returns have been accepted by the IRS and the Franchise Tax Board. This Agreement automatically terminates after the delivery of services.

Client understands that all returns are subject to review by taxing authorities. Preparer may be able to assist in the event Client receives a letter (Tax Notice) from either the IRS or the Franchise Tax Board, but is not an Enrolled [Agent](#), and therefore will not be able to represent or defend Client in any capacity before the IRS or the Franchise Tax Board. If it is discovered that the letter is in relation to an error on the part of Preparer, Preparer will amend Client's tax return free of charge.

This Agreement also informs Client of Preparer's privacy policy. Preparer values Client's trust and confidence and wants to assure Client that all information about Client is secure and confidential. Preparer adheres to the highest level of professional ethical standards and obligations to protect the confidentiality of all Client information. Preparer will not disclose any nonpublic personal

information about Client. Preparer will keep Client's tax returns until the 15th day of October of the third year after which the returns were filed.

By signing this Agreement, Client affirms that this letter correctly summarizes Client's understanding of the engagement of Veronique Colas for her Income Tax Preparation Services.

RESOLUTION OF DISPUTES

If not resolved first by good-faith negotiation between the parties, any dispute or controversy arising out of this Agreement shall be submitted to final and binding arbitration in accordance with the laws of the State of California. The arbitrator's award shall be final, and judgment may be entered upon it by any court having jurisdiction thereof. By signing this Agreement, the Client agrees to this arbitration clause.

Client agrees to indemnify and hold Preparer harmless with respect to any and all claims arising from the use of the tax returns for any purpose other than filing with the IRS and state and local tax authorities regardless of the nature of the claim, including the negligence of any party. Preparer's engagement does not include any procedures designed to detect errors, fraud, or theft. Therefore, Preparer's engagement cannot be relied upon to disclose such matters. This Agreement is limited to the professional services outlined above.

SIGNATURE

I, (Client) _____, understand and agree to the terms set forth above.

Client Signature: _____

Client's address: _____

Client's phone number: _____

Client's email address: _____

Today's date: _____

I, (Spouse) _____, understand and agree to the terms set forth above.

Spouse's signature: _____

Spouse's address: _____

Spouse's phone number: _____

Spouse's email address: _____

Today's date: _____