

ONE-TIME PAYMENT FORM & SERVICE TERMS

Simple, Effective, Affordable Tax Solutions!



ONE STOP
CONSULTING SHOP, LLC
Accounting • QuickBooks • Tax Services

Schedule your payment to be automatically deducted from your bank account, or charged to your credit card.

Please complete the information below:


I _____ authorize One Stop Consulting Shop, LLC to charge my credit card / checking account indicated below for \$ _____ on today's date (or the soonest possible after this date) of _____ for payment of my _____.

Billing Address: _____ Phone #: _____

City, State, Zip: _____ Email: _____

Checking / Savings Account:

<input type="checkbox"/> Checking	<input type="checkbox"/> Savings
Name on Account _____	
Bank Name _____	
Account Number _____	
Routing Number _____	
Bank City / State _____	



Credit Card:

<input type="checkbox"/> Visa	<input type="checkbox"/> MasterCard
<input type="checkbox"/> Amex	<input type="checkbox"/> Discover
Cardholder Name _____	
Account Number _____	
Exp. Date _____	
CVV (3 digit number on back of card) _____	

Signature _____ Date _____

I understand that this authorization will remain in effect only for the above stated one-time payment. If the above noted payment dates fall on a weekend or holiday, I understand that the payments may be executed on the next business day. For ACH debits to my checking/savings account, I understand that because these are electronic transactions, these funds may be withdrawn from my account as soon as the above noted periodic transaction dates. In the case of an ACH transaction being rejected for Non Sufficient Funds (NSF), I understand that One Stop Consulting Shop, LLC may at its discretion attempt to process the charge again within 30 days, and agree to an additional \$25 charge for each attempt returned NSF which will be initiated as a separate transaction from the authorized recurring payment. I acknowledge that the origination of ACH transactions to my account must comply with the provisions of U.S. law. I certify that I am an authorized user of this credit card/bank account and will not dispute these scheduled transactions with my bank of credit card company; so long as the transactions correspond to the terms indicated in this authorization form.

I also understand that by signing this Payment Authorization Form, I am giving my consent to begin work and I understand that all tax return deposits are non-refundable and required to begin work. I also affirm that by signing this form I have read, understand and agree to the Client Engagement Terms outlined either on the One Stop Consulting Shop LLC website and/or on this document and all documents previously emailed to me. My consent to authorize work and payment constitutes my agreement with these terms and conditions as well as providing my affirmation that all information provided to One Stop Consulting Shop LLC is accurate and truthful.

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Section 1: Communication and Documentation

One Stop Consulting Shop, LLC throughout this document may be referred to as "One Stop". Our primary source of communication is email. Email must be frequently checked for notices, questions, updates and other communications. While One Stop may elect to call or text, any requests for documents or other services must be made in writing (via email). Make sure sensitive information is uploaded to our portal and never emailed. One Stop does not accept "whatever is provided". We work to ensure your accounting and tax returns are as "audit-proof" as possible. We may request additional information from you to ensure that if you are audited, you are in the best position possible. Every monthly client (for recurring bookkeeping and payroll) will be assigned a dedicated Client Manager who will complete bookkeeping, process payroll and answer any regular operational questions. Clients will also be assigned a dedicated Tax Professional for tax preparation, bookkeeping guidance and adjustments the tax situation evolves. The entire client team will work together to ensure a seamless transition from book to tax throughout the year. One Stop Consulting Shop will request each bookkeeping client conduct a mini tax review for a small fee during the summer so that your assigned Tax Professional can review your financial statements and/or payroll and make any suggested changes for the duration of the tax year.

Section 2: Taxes

Tax Preparation is a dynamic process that requires on-going communication and dialogue. It's our mission to guide you through the process to ensure accuracy, understanding and compliance. Until all requested documents and back up are provided, a tax return will not be entered into the Queue. There may be several back and forth communications as One Stop makes inquiries, reviews and ensures a thorough analysis of all documents and questions to maximize the client's benefit and reduce the tax liability. A 50% non-refundable deposit may be required towards the preparation of the tax return. Tax returns will not be delivered to clients until the balance due is paid. The deposit is non-refundable because work begins as soon as we have the initial conversation with the client and all information is scanned, reviewed and compiled. The deposit is required to ensure that a client does not "change their mind" if the client does not like the final result of the return. When a tax return is completed, it will be sent to the client using ShareFile (returns will not be emailed unless encrypted). It is the client's responsibility to review the return and sign/return the form 8879 (by uploading it to the client portal) that allows e-filing. A return is not accepted by the IRS until that occurs. If a return is not e-filed, the client must mail the return to the IRS and appropriate State authority. It is always recommended to e-file if possible to verify acceptance by the IRS. Requests for extensions of time must be submitted to One Stop with at least 7 days' notice prior to the deadline and a non-refundable deposit is due at this time. One Stop utilizes third-party tax professionals and the client must sign a client release form to have taxes completed. The return will be signed by an Enrolled Agent or CPA (third-party tax preparer) but ultimately each client is still responsible for the accuracy of the return.

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Should a client decide to use another tax preparation firm, they must sign a release form so One Stop can forward bookkeeping reports to that firm. One Stop will not forward a back-up copy to the Provider and the QuickBooks file that One Stop prepares remains the ownership of One Stop however any detailed reports will be sent. An Accountant's Copy may be sent to another firm as well if requested.

Clients may be asked to show back-up documentation to substantiate deductions and credits and these requests may include, but not be limited to, mileage logs, receipts, bank statements, adoption papers, and any other document required to ensure an accurate and complete tax return. For charitable donations, any cash donation over \$250 requires a written letter from the organization and any "good" donated requires a receipt with the amount (value) and donation description written on the receipt. For substantial donations, it is the client's responsibility to ask One Stop at the time of the donation how to properly document the donation so it can be deductible. For mileage logs, clients must maintain a written log (or if using an "App" the same requirements apply for the report printed) that includes documentation identifying the vehicle and proving ownership or a lease and a daily log showing miles traveled, destination and business purpose.

Tax preparation, tax planning, responding to IRS notices and other tax-related engagements are above and beyond the scope of bookkeeping or tax preparation services and require an additional request and agreement for service. These additional services may have additional fees and may require a separate engagement letter.

Tax Return Extension (of time) is NOT an extension for payment. Any tax payment must be submitted by the 15th of the 4th month following a tax year-end (for individual returns). If estimated taxes were not paid and tax is due, penalties and interest may be accrued by the IRS and other taxing authorities. Estimated tax payments are the client's responsibility. Clients must authorize One Stop to make any additional withholdings through payroll OR clients must send payments using vouchers received from their prior year tax return or the IRS online Direct Pay system.

Clients must inform One Stop of all estimated payments made (date and payment) at the time of tax preparation so these payments can be included. Estimated taxes for Partnerships, S-Corps, and Sole Proprietors are to be paid using the client's social security number and through the personal bank account (they are not business taxes) on the 15th of April, June, September and January. These are "flow through" entities. Estimated taxes for C-Corps are due on the 15th of April, June, September and December and are paid using the IRS EFTPS system (this is a requirement for c-corps). These taxes should be paid from the business bank account. If a c-corp has a loss for the year, estimated taxes can be calculated by quarter; however, if taxes were owed in a previous year, then the C-Corp MUST pay 100% of what was paid OR if profit is over a 50% increase, then 110% must be paid.

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There is a separate fee to set up an Installment Agreement with the IRS if taxes are owed however a client can set up an installment agreement themselves directly with the IRS. Clients must send in manual payments to the IRS at least 72 hours before the date the amount is due on a monthly basis until the installment agreement is active by the IRS. The only way a client is made aware that the installment agreement is active is by checking their own bank account for IRS auto-debits. Clients are fully liable for any and all payroll taxes accrued by their company through use of One Stop's payroll system and these fees are paid electronically on the behalf by the established due dates. The Client is responsible for any NSF fees associated with bank issues and the Payroll System (Intuit Online Payroll) may terminate a client's account for excessive NSF situations.

Section 3: Fees

Tax Planning and responding to IRS and/or State Notices that are not a direct result of any action taken by One Stop, are above and beyond the scope of this engagement and may require an additional fee for questions, research and written responses to IRS correspondence. Clients must provide a copy of the prior year tax return to receive a tax quote (which is subject to change after initial estimate if clients exclude information that changes the scope and complexity of the engagement). After full review, the client will receive a final cost with an engagement letter for the service.

Deposits are non-refundable for tax preparation. Clients will be billed for any mailing services and a fee of \$15 per mailing will be charged to the client to your payment form on file. For tax clients, if you do not pick up your original materials, they will be mailed to you by August 1st. If One Stop is engaged to recreate an entire year of bookkeeping and is not provided a copy of the Profit & Loss Statement and Balance Sheet used in the prior year tax return at the time of set up, this may increase future clean up required and will be billed at that time should clean-up be required as a result of not having adequate source documents at the time of set up (for companies with an operational history).

One Stop has the right to suspend services or to withdraw from this or any engagement in the event that any of invoices are deemed delinquent. In the event that any collection action is required to collect unpaid balances due us, the client agree to reimburse One Stop for the costs of collection, including attorneys' fees. If clients have a payment plan for a service already rendered and choose to leave One Stop, the client is still required and responsibility to pay the balance due in full and any payment plan will cease. Any returned items will be charged a service fee that includes the amount billed to One Stop plus a \$5 administrative fee. If One Stop elects to terminate services for nonpayment, or for any other reason provided for in this letter, the engagement will be deemed to have been completed upon written notification of termination, even if we have not completed our report. Clients will be obligated to compensate One Stop through the date of termination. Clients must compensate One Stop for any involvement and related fees for responding to subpoena, court order or other legal process requiring testimony or the production of documents.

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Any client with a payment plan must pay the balance due in full should services be terminated. If services have already been rendered and a client terminates future services, all payment plan balances are due in full within 7 days.

Because One Stop was founded on the values of proactive communication and education, we provide many complimentary services to our recurring clients. However, there is a point when the scope of questions and services may go beyond our initial offerings and require additional fees. In no way can One Stop be responsible for the success or failure of any business. Clients are accountable for the decisions they make and understand the scope of One Stop's services include establishing an accounting system, use of QuickBooks, bookkeeping, payroll services, and tax preparation to help clients plan for a successful future and reduce tax liability. Should a client need other types of assistance, One Stop will refer them to a trusted business partner. Clients have access to our team of trusted advisors year-round.

One Stop does not charge for simple questions that occur throughout the year as we believe this personal attention and guidance is critical for the success of new businesses. Should a question become more complex in nature, meaning go over 15 minutes of time required to research the answer and requiring a detailed review of information, then a Tax Planning Session (additional fee applies) or QuickBooks Consultation Fee may be required.

While One Stop is proactive to inform clients of changes in the law, it is the client's responsibility to inform One Stop when personal or business situations have changed that may affect tax liability. Clients must provide notices from any Taxing Authority to One Stop within 72 hours of receipt via email or drop box (text is unacceptable). An untimely delay of forwarding information to One Stop may result in a client's accrual of IRS penalties and interest.

One Stop Consulting Shop was created to help our clients understand and improve their accounting and tax situation. Based on the values of proactive communication, area specific expertise and education, we believe every client, regardless of size or revenue, deserves the same level of attention and respect.

We are proud to have served our clients in Florida and across the Country for the past 6 years and we look forward to being a part of your team! Welcome aboard!

Please remember by approving your payment authorization form you are affirming that you have read, understand and agree with all terms and conditions outlined in this document.