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Date

Client Name

Address

Thank you very much for reviewing this proposal for a Fixed-Price Agreement. To avoid any misunderstandings, this agreement defines the services we propose to perform for you under this agreement.

**Fixed-Price Agreement (“FPA”) XXX 1, 2021 through January 31, 2023**

Fox & Company CPAs, Inc. proposes to provide the following services for Client Name (herein-after ‘Client’) for the above timeframe. To best meet the service needs and price considerations of Client, we offer the following proposal:

**2021 (through Jan 31, 2022):**

- Income tax planning and projections for the 2021 tax year

**2022 (through Jan 31, 2023):**

- Preparation of your 2021 personal income tax returns for federal, state, and local if applicable. This also includes:
  - ✓ Income tax planning and monitoring, including meetings as needed
  - ✓ Any amended returns required for periods and all state/federal agencies covered by FPA (except for the below termination provision)
  - ✓ Response to all income tax notices and correspondence with all state and federal agencies for periods covered by FPA

**Monthly Fixed-Price Agreement: \$XXX/month**

**Payment Terms for FPA:**

ACH or credit card payments billed at the beginning of each month. See attached authorization. All credit card transactions will include a 3% convenience fee.

**Audit Protection**

If you are audited on a return prepared under this FPA, we will represent you before the IRS or state agency. This does not guarantee that you will not be audited or that we will compensate you for any changes made during an audit.

**Unanticipated Services**

While your FPA entitles you to all the services described above, if you have an issue that requires work that is not covered in your FPA, we will let you know before proceeding. If a Change Order is necessary, we will mutually agree to any changes in your services.

**Service and Price Guarantee**

**Our work is guaranteed to the complete satisfaction of Client.** If you are not completely pleased with the services performed by Fox & Company CPAs, Inc., we will, at your option, either refund the price or accept a portion of the price that reflects your level of satisfaction. Upon final payment of the terms in your FPA, we will assume you have been satisfied.

Should you not believe that at least full value has been received for price paid under this Agreement due to our lack of attentiveness and/or responsiveness, you have the option (within 10 days of the end of the fiscal year ending 1/31/xx) to call a meeting to discuss value received under this contract. At that point, our firm guarantees a refund of the amount of value that you believe you have not received.

FPA contracts for a full year of service (plus any part year from the date you sign on) are due and payable for the full period under the terms of this contract, regardless of whether you choose to utilize all services offered during the year for which this contract is in effect. If requested, refunds *may be offered* on a case-by-case basis. **Clients who terminate our services and are not in good standing (i.e., who leave with unpaid balances) also terminate their rights to receive services for amended returns and/or responses to tax notices at no additional charge.**

**Termination**

**We understand that either party may terminate this FPA at any time, for any reason, within 10 days' written notice to the other party. We also agree that any outstanding invoices for unpaid services for the balance of the period included in this contract will be paid in full within 10 days from the termination date.**

If you agree that the above adequately sets forth your understanding of our mutual responsibilities, please authorize this Agreement and return it to our office.

We want to take this opportunity to say "THANK YOU" for giving us the opportunity to serve you.

Very Truly Yours,



Laura Clifford, CPA, President  
Fox & Company CPAs, Inc.

Agreed to and accepted by:

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

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

**The terms of this proposal expire two weeks from the date of offering.**