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DATE

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") through December 2017**

Fox & Company CPAs, Inc. proposes to provide the following services for the NAME (hereinafter 'Client') for the above timeframe. In order to best meet the service needs and price considerations of Client, we offer the following proposal:

- Preparation of your XXXX 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
  - ✓ Response to all income tax notices and correspondence with all state and federal agencies for periods covered by FPA

**Annual Fixed-Price Agreement: \$ XXX**

**Advice and assistance will be provided during the term of the Agreement as follows:**

- Rapid response (same day is standard) when you contact us for assistance and advice
- Our secure client portal, which provides a private way to send confidential information

**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 of 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, you have the option (within 10 days of the end of the FPA period) 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.

**Termination**

**We understand that either party may terminate this FPA at any time, for any reason, with 10 days' written notice to the other party. We also agree that any outstanding invoices for unpaid services 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,



James Koinis, President  
Fox & Company CPAs, Inc.

Agreed to and accepted

By: \_\_\_\_\_

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

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