

Susko Wealth Management, LLC

Our Guarantee

*It is our goal to provide awesome service to each and every one of our clients.
Please take the time to read this information carefully and completely.*

Our Guarantees to You

- We will have your 2018 individual tax returns ready within 15 days or sooner. ¹
- We will provide free phone calls for all 2019. ²
- We will provide free electronic filing. ³
- We will return your emails and phone calls within 2 business days.
- We will start your appointment within 15 minutes of the scheduled time. ⁴
- We are responsible for penalties related to our preparation errors. ⁵
- Your return will always be reviewed by at least 2 sets of eyes. ⁶

The Investment

- Your all-inclusive investment with us assumes no material changes from last year. ⁷
- The investment is payable when your returns are completed or sooner.
- You can pay by cash, check, or credit/debit card including VISA or MasterCard.
- There will be a \$50 re-run charge for client changes after our completion and a 10% surcharge for all returns received after 9/1/19. ⁸

Your Guarantees to Us

- You will do your best to accumulate your tax information in an orderly manner and submit the information as early as possible.
- You will punctually attend your appointment and have your complete information or call us to reschedule at least 72 hours in advance. You understand no appointments will be scheduled between April 8, 2019 and April 15, 2019.
- You will make an effort to refer at least one client like yourself to our firm so that we can continue to be here for you when you need us.

1. The clock starts when all information is received (Guarantee applies for information received prior to April 1, 2019). We are not responsible if IRS software is not ready to accept returns.
2. If the question or issue requires additional research and analysis beyond the initial consultation, that work will be subject to an additional price quotation before the service is performed where possible.
3. You will always receive an email copy. If a government authority does not accept e-filing or certain information invalidates e-filing, we will prepare your return for paper filing.
4. You need only be in our office by the appointed time.
5. We work hard not to make errors on your tax return. If you have given us complete and accurate information and we fail to properly prepare your returns based on that information, we will pay the penalties associated with the error.
6. All tax returns are prepared and/or reviewed by at least 2 professionals and 1 administrative team member.
7. Your fee can be adjusted upward or downward based on material changes from last year. You will be notified of upward adjustments before the service is performed where possible.
8. Once we have finished the return and you make changes, we will assess a minimum \$50 re-run charge each time. We will also add a 10% surcharge when the return information is received after 9/1/19.