# Forum Tax Planning's Clear and Concise Client Agreement

*No long, drawn out legalese here! Below is a list of what you agree to, and acknowledge, as a client of Forum Tax Planning.*

**What We Will Do**

We will prepare your annual Federal and State (or multiple states) income tax return, and declaration of estimated tax (if applicable) from the information you provide to us. We will provide the completed returns to you via our online client portal, as well as in paper format if you request a paper copy.

**What You Will Do**

To the best of your knowledge, you confirm that you will include all income, deductions, and all other information necessary to prepare your returns. You agree that said information will be complete and accurate. You agree that the information you submit to us is your own representation which you deem to be true and accurate.

**Audits/Errors**

If your returns are selected to be audited by federal or state authorities, we will represent and communicate on your behalf, to the extent we are allowed. In some cases, other professionals will have to be used. If you receive a letter from the IRS regarding an error or an inconsistency between what was reported on your return and what was reported to the IRS, we will prepare a written response to that letter. If the error/inconsistency is a result of inaccurate or missing information, you are solely responsible, and we may charge you for the service of responding to the IRS. If the error/inconsistency is a result of the preparer's error, we will not charge for responding to the IRS; however, any resulting tax changes that reflect your then accurate tax situation are your responsibility, as you are the taxpayer.

**Privacy Policy**

Every piece of information you submit to us is considered to be private and confidential in nature. We will not provide any information to anyone else, unless you provide express written consent to do so. We will maintain said information in a secure manner to the best of our ability. Our online client portal is the most secure way to send information to us, and receive it from us. If you send information to us in a manner that is not secure, we are not responsible for what may happen to that information as a result of it being sent in a manner that in not secure. Once you download files from the online client portal, you are responsible for the security of said downloaded files.

**Document Retention/Access**

Any paper documents given to us by you will be returned to you after the completing of your return(s). In most cases, we will maintain electronic copies of these documents, but we are not responsible for the retaining and maintenance of said electronic version of client documents. We cannot be relied upon to provide copies of said documents at any point in the future. The retention and maintenance of tax preparation documents is the sole responsibility of the client. Files will be stored in our offices, or electronic databases, and may be removed by us for purposes of working on your returns at another location. Our online client portal is the best way to access your returns that we have prepared. If you no longer remain a client of ours in the future, we reserve the right to close your online portal account. In such case, we will give you notice by email, and phone (not by written mail), and allow you portal access for 30 days from the date of that notice, so that you have adequate time to retain any files you require. After that time, we are not responsible for providing you any files you failed to acquire during that 30 day period.

**Acceptance of This Agreement**

You agree that by submitting your Tax Questionnaire via our website, on your own or in person/by phone with a preparer, you are agreeing to the terms of this agreement for this year's return, and for any previous returns completed by us on your behalf.

## Thank you for being a Forum Tax Planning Client!