



Important Notes (Also Known As): *The Fine Print*

- We do not begin work on your return until we receive a signed Engagement Letter and payment as selected in the signed Engagement Letter.
- Any balances are to be cleared from your account prior to filing the first tax return.
- If you owe taxes, waiting to file them does not defer the due date.
- If we receive your documents after Feb 28th for Business Returns or March 30th for Personal Returns, we may file an extension for you and complete your taxes in the order they were received. If taxes are owed, they are due to the appropriate Government agency (IRS or State DOR) by the initial April 15th personal tax deadline. We will provide a payment voucher.
- For your protection against fraud, we do not email paperwork that contains your Social Security Number. We have access to a secure portal and we request that you use it.
- We would very much like to file your returns quickly; however, we must have your signature on the e-file authorization forms. Please submit those to us as soon as possible following your review.
- We at Credo pride ourselves on being responsive to our clients. If you have questions or a complex item requiring research that is outside of the scope of the signed Engagement Letter, please schedule a tax consultation meeting with one of our experts. These are billed at \$250/Hour. If you have engaged with us for Tax Strategy, this is already included with no additional charge. Contact us if you would like to change your package.
- If your business or personal expenses require summarization to be presented on your tax returns, Credo offers this service for an additional \$75/hour.
- If you discover new information that should be included in a previously filed return, we'd be happy to help. Amended returns are billed at \$125/hour for Personal and \$150/hour for Business returns.
- If you are unsure about what is covered in your fees, please ask; we are happy to clarify.

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