



TAX ENGAGEMENT AGREEMENT

This is an agreement between Clergy Advantage® Inc., hereinafter referred to as "Clergy Advantage" and the Client listed below for the **Preparation of their 2015 Individual Federal and applicable State income tax returns.**

Name: _____

Spouse Name: _____

Mailing Address: _____

City: _____ **State:** _____ **Zip:** _____

Daytime Phone: _____ **Cell Phone:** _____

Email: _____

Services – Clergy Advantage will prepare the Individual Federal and applicable State income returns for 2015, based on Client information obtained by interview, mail, e-mail, or inputted by Client through our internet access. Consultations are included only if they relate to the actual tax preparation. Your estimated tax preparation fee includes:

- *Timely response to all of your questions pertaining to your 2015 tax returns*
- *Free filing of extensions upon your written request*
- *Free electronic filing of tax returns*
- *One hour of financial planning with our in-house financial advisor to optimize tax advantages and clergy retirement strategies.*
- *Clergy Advantage® Newsletter and News Flashes*
- *Free educational services, workshops, webinars, worksheets and forms*

Estimated Fee – Clergy Advantage's estimated fee for the 2015 preparation, including the services listed above will be \$495 – \$530 for a client with typical tax return filing. Any changes to the estimated fee, other than those listed below, will be determined and agreed upon by Client and Clergy Advantage before completion of the tax returns.

Clergy Advantage® defines a non-typical tax return as those returns having Non-Minister Schedule C businesses, Partnerships, S Corporations, numerous Stock Transactions, Rental Properties, Multiple State returns required, and any other non-typical reporting requirements.

This signed agreement and a \$200 deposit along with a copy of your previous year's tax return are required to begin the onboarding into the Clergy Advantage system.

By signing this agreement I agree to partner with Clergy Advantage and...

- I agree to provide all required information (the CLERGY ADVANTAGE® Tax Organizer, either paper or electronic version, with supporting documentation) necessary to complete my tax return(s). This includes all items of income subject to income tax.
- I understand and accept the CLERGY ADVANTAGE® policy that tax preparation work will not begin until there is a signed **Engagement Agreement** and my deposit or ACH form has been received.
- I agree to retain all the documents, receipts, canceled checks and records required to substantiate the items of income and expense reported on your return(s) for 5 years.
- If I receive any letters or notices from the IRS or state taxing authorities, I will immediately send a copy to CLERGY ADVANTAGE®.

Also agree that...

- CLERGY ADVANTAGE® will use professional judgment in resolving any discrepancies regarding the interpretation of tax law, and conflicting opinions between the tax authorities' interpretation and other supportable positions,
- CLERGY ADVANTAGE® will not audit or otherwise verify any information. However, CLERGY ADVANTAGE® may require clarification or additional information before filing.
- CLERGY ADVANTAGE® is not responsible for disallowed deductions or the inclusion of additional unreported income or any resulting taxes, interest and/or penalties assessed.
- In the event of preparer error, CLERGY ADVANTAGE® is responsible for any penalty assessed due to such error. I will be responsible for additional tax and interest that may be assessed.
- CLERGY ADVANTAGE® will not file any Federal, State or local Tax Extensions without my specific written request to do so. Authorized extensions will be filed at no charge as long as a signed **Engagement Agreement** is in effect and a deposit has been received by CLERGY ADVANTAGE®.
- Should I decide to cancel this agreement a cancellation fee will apply based upon the time and services CLERGY ADVANTAGE® invested in my return.
- Clergy Advantage, Inc. reserves the right to withdraw from this engagement, at its discretion. Withdrawal can occur for, but is not limited to; failure to provide information in a timely manner, refusal to comply with reasonable requests or misrepresentation of any facts. Withdrawal will release Clergy Advantage, Inc. from any obligation to complete any service and will constitute completion of this agreement. I agree to compensate Clergy Advantage, Inc. for time and expenses incurred for services through the date of withdrawal.

My dated signature below constitutes full acceptance of all terms and conditions specified above.

By: _____ Date: _____
(Client's Signature) Only one signature is required.