



Ingenious CFO
Simplifying a regulated world

ProPlan Individual Fixed-Price Agreement

Dear _____,

In order to document the understanding between us as to the scope of the work that Ingenious CFO will perform, we are entering into this Fixed Price Agreement with you. To avoid any misunderstandings, this Agreement defines the services we will perform for you as well as your responsibilities under this Agreement. This Agreement is an addendum to our Engagement letter.

Professional Services

We will provide the following services for you during the introductory subscription period to :

- Up to 2 hours of audit or tax authority correspondence support
- 1 tax planning meeting (up to one hour)
- 2 paycheck withholding calculation reviews
- Preparation of individual federal and California state income tax returns. See Forms Addendum for a list of included tax forms and schedules.
- Amended tax return preparation coverage for the above returns, if necessary
- Unlimited email and telephone support to discuss tax matters including life events and changes, and any other topic at your discretion.

Because our ProPlan Individual Fixed-Price Agreement provides ongoing access to the tax advice you need on a fixed-price basis, you are not inhibited from seeking timely advice by the fear of a meter running endlessly. Our program is built around one-price pricing, as opposed to hourly rates, and offers you access to the accumulated wisdom of the firm through professionals with substantial experience, who can help enhance your financial future and achieve your goals.

While the fixed price entitles you to unlimited consultation with us, if your questions or issues require additional research or analysis beyond the consultation, that work may be subject to an additional price negotiation before the service is to be performed, utilizing a Change Order.

Resource Requirements

The ultimate success of any tax planning and withholding calculation review will hinge upon your involvement and participation. You may be asked to provide information and documentation to assist us.

INGENIOUS CFO 39300 Civic Center Drive, Suite 110 Fremont, CA 94538, Call us : 510-413-7046, fax : 510-991-6825

Unanticipated Services

Furthermore, the parties agree that if an unanticipated need arises (such as, but not limited to, an audit by a taxing agency or any other service not anticipated in this Agreement by the parties) that Ingenious CFO hereby agrees to perform this additional work at a mutually agreed-upon price. This service will be priced separately to you utilizing a Change Order.

Service and Investment Guarantee

Our work is guaranteed to the complete satisfaction of the customer. If you are not completely satisfied with the services performed by Ingenious CFO please notify us immediately. Upon final payment of the terms in this Fixed-Price Agreement, we will assume you have been satisfied. Furthermore, if you ever receive an invoice without first authorizing the service and/or the price, you are not obligated to pay for that service.

Fee and Payment Terms

Your total fee for the above services is \$. You and Ingenious CFO hereby agree to the following payment plan: Twelve (12) monthly payments of \$ beginning , 20 . Payments will be made through automatic recurring checking account withdrawals (EFT/ACH) or credit/debit card payments.

Automatic Renewal

Furthermore, it is understood that at the end of the initial PERIOD noted above, your subscription to the ProPlan Individual Fixed -Price Agreement will automatically renew for an additional 12 month period for an annual fee of \$. This automatic 12 month renewal will continue unless either party terminates this Agreement in writing. If there is a change to the fee for a new 12 month period, you will be notified 30 days in advance.

It is also understood that either party may terminate this Agreement at any time, for any reason, within 10 days written notice to the other party. It is understood that any unpaid services that are outstanding at the date of termination are to be paid in full within 10 days from the date of termination.

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 appreciate the opportunity to help you.

INGENIOUS CFO

By:

Angel M. Perez, EA CFP
Michael G. Mouriski, CPA

Above agreement accepted by:

Taxpayer's Signature

Printed name

Date

Taxpayer's Signature

Printed name

Date