TAX CLIENT AGREEMENT – 2025

$219.00 Complete Individual Tax Preparation for individuals including e-filed personal, single or joint, federal, and one state returns for one tax year.

ADDITIONAL CHARGES MAY APPLY:

Schedule C (Business) - $150 each	Amended Return - $219 each
Schedule D more than 10 Entries (Stocks) - $10	Earned Income Credit - $100
Schedule E and Form 4835 (All Rentals)-$100 each	City Return – $50each
Schedule F (Farm) - $150 each	Additional State (1 included) - $50 each
K-1s - $50 each	Copy of previous years return – $35 each
Trust & Business - Negotiable with Tax Prepare – STARTING at $300	
Filing after the April 15th - September 15th - $100 fee plus tax preparation fee	
Filing after the September 15th - October 15th $200 fee plus tax preparation fee	

*** IMPORTANT NOTE ***

*If you, the client bring in new or revised information (e.g. 1099's, W-2's, additional deductions, etc.) after taxes have been delivered or printed, you agree to pay The Chamberlin Group, Inc., an **additional $50** to update and re-print the return(s). We will not e-file your return without your signed consent. _______ **Initials**

*** HOUSEHOLD HEALTH COVERAGE***

Did you purchase insurance through the marketplace (Obamacare) at all during 2024?

YES ☐ or NO ☐ If YES, you must provide a 1095-A.

Email address: ____

Contact phone number: ______________________________________

ACKNOWLEDGE: For Joint Returns, **both spouses must be present to pick up** the tax return. ________ **Initials**

In order to complete these services, the client will be asked to provide certain information. It is the client's responsibility to make sure the provided information is complete and accurate. The services do not include any verification of the information provided by the client. It is also the client's responsibility to maintain records of this information in order to satisfy tax authority inquiries. Tax returns will be electronically filed after 5 PM the business day following the tax delivery. It is the client's responsibility to review it for accuracy. If the client finds changes are needed, the client will contact the preparer by e-mail or call the office before 5 PM the next business day after signing Form 8879. I understand and agree to the terms outlined above.

Client Signature: ______________________ Print Name: ______________________ Date: ________

Spouse Signature: ______________________ Print Name: ______________________ Date: ________

CHAMBERLIN
EST. 2002

CONSENT FOR USE OF TAX RETURN INFORMATION

Federal law requires this consent form be provided to you. Unless authorized by law we cannot use, without your consent, your tax return information for purposes other than the preparation and filing of your tax return. You are not required to sign this form but if you do it will assist us in providing various services to you.

I hereby consent to the use of any and all tax return information contained in federal income tax returns (Form 1049 series and supporting schedules) by The Chamberlin Group for the purpose of reviewing for accuracy and to potentially assist with retirement planning services including SEP, Roth, Simple IRA/401K/403b and Thrift Savings Plan contributions and rollovers; estate, financial, insurance and tax planning; life, long term care, medical insurance, annuities and investments by the way of example and not limitation.

Taxpayer Signature ___________________________

Print Name ___________________________________ Date _____________________

Spouse Signature ___________________________

Print Name ___________________________________ Date _____________________

Tax Preparer Signature _________________________ Date ______________________

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at complaints@treas.gov.