



Engagement Letter and Billing Authorization

Contact name _____

Company _____

Address _____

City, State, Zip _____

Business Phone _____

Mobile Phone _____

Email _____

Thank you for your interest in using our services. We are a local CPA firm specializing in service to small businesses and individuals. We offer QuickBooks consulting, business/accounting consulting, tax preparation, business valuation, and financial statement services.

Telephone/web-conference/other hourly; ¼ hour increments:

QuickBooks Online (QBO) consulting by Natalie Moller, Advanced Certified ProAdvisor	\$120/Hour
Consulting provided by Bryce Forney, CPA	\$280/Hour

Flat fee rates:

Individual tax returns, with no business or rental activity	\$ 600
Individual tax returns with business (including single-member LLC) and/or rental	\$ 1,050
Business tax returns (S-corp, C-corp, Partnership, multi-member LLC, Nonprofit)	\$ 1,350
Financial statements (audit/review/compilation), Business valuations, 571-L	As quoted

We invoice at time of service, payment through automated credit card or bank debit authorization (Page 2). Our rates change annually and current rates are always published at <http://www.forneycpa.com/fees.html>.

We require a signed engagement letter and completed billing authorization prior to providing service. Please complete contact and billing information and return by email, upload, or fax. We look forward to working with you!

I accept the terms of this engagement: _____

Our privacy policy is at <http://forneycpa.com/privacypolicy.html>

Billing Authorization

I authorize Forney Accountancy to charge the card below or debit the bank account below for the amount of professional services rendered or products ordered per invoice amount, consistent with engagement letter or other agreed terms. I authorize charge at time of service or product order. This authorization remains in effect unless cancelled in writing.

Choose credit card or bank debit payment type:

Credit Card

Credit card type: Visa MasterCard American Express Discover

Name as it appears on card _____
Credit card number _____
Card security code _____
Card expiration date _____
Card billing street address _____
Card billing city, state, zip _____
Signature/printed name _____
Date signed/effective _____

Bank Debit

Account type: Business Personal

Name on account _____
Bank routing number _____
Bank account number _____
Phone number on file with bank _____
Signature/printed name _____
Date signed/effective _____