Client Fee Acknowledgment

TAX YEAR 2026 | 2027 FILING SEASON | DRAFT FOR REVIEW

Client name: _____ Date: _____

Review the itemized fees before signing. Fees are not based on a percentage of the refund. A $150 cancellation fee applies if you cancel after signing this acknowledgment, subject to applicable law. Additional return copies cost $50 per tax year, subject to applicable rights. Any retainer is determined by discussion and documented below. This form does not authorize a bank product or deduction from a refund.

Tax preparation fee

State / additional schedules fee

Optional bank product and other disclosed fees

Total agreed fee

Retainer amount, due date and credit toward fee

Payment method and balance due

Cancellation terms acknowledged (initials)

Client signature: _____ Date: _____

Spouse signature (if applicable): _____ Date: _____