



## Engagement Letter and Billing Authorization

### Client information

Contact name \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone \_\_\_\_\_

Fax \_\_\_\_\_

Email \_\_\_\_\_

Website \_\_\_\_\_

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 accounting consulting, general business consulting, tax preparation (business and individual), and business valuation services.

Our current professional service rates for accounting and tax consulting are billed hourly. Amanda's current rate is \$110/hour and Bryce's current rate is \$200/hour. Each of us has a two hour on-site minimum and we bill in ¼ hour increments for off-site time (web conference, phone, and work performed at our offices). Our current flat-fee for individual tax preparation is \$440 (Federal/State combined), and \$975 for business returns (Partnership, LLC/LLP, S-Corp/C-Corp).

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

We require a signed engagement letter and completed billing authorization prior to providing service. To engage our services please complete this 2-page form with contact and billing information, type (or sign) your name on the signature line and transmit using the "Submit Form" button (or print and send).

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 \_\_\_\_\_