

Authorization to Begin Work

Simple, Effective, Affordable Solutions!



ONE STOP
CONSULTING SHOP, LLC
Accounting • QuickBooks • Tax Services

Please check the Payment frequency below for the agreed upon fee provided to you through email.

One Time: _____ Tax Preparation _____ Catch-Up Bookkeeping _____ QuickBooks Training
Recurring: _____ Monthly Bookkeeping/Other Accounting Service

We believe in transparency. There is never an obligation to continue services. To cancel services, simply send an email. Completion of this form confirms your understanding and agreement with all terms. This authorization to begin work will not begin until this document is signed and your first payment is successfully processed.


Please complete the information below:

I _____ authorize One Stop Consulting Shop, LLC to charge my **Credit Card or Bank Account** indicated below for the above indicated service and payment frequency.

Billing Address: _____
City, State, Zip Code _____ Cell Phone #: _____
Email: _____

Checking / Savings Account:

_____ Checking	_____ Savings
Name on Account _____	
Bank Name _____	
Routing Number _____	
Account Number _____	
Bank City / State _____	



Credit Card:

_____ Visa	_____ MasterCard
_____ Amex	_____ Discover
Cardholder Name _____	
Account Number _____	
Exp. Date _____	
CVV (3 or 4 digit number on back of card) _____	

Signature _____ Date _____

Our team believes in transparency in all our communications and operations. Please read the following points on the next pages that further outline our Fees and Terms of Engagement. An additional engagement letter is required for tax preparation. My signature above confirms I have thoroughly read, understand and agree to all fees and terms of engagement with One Stop Consulting Shop LLC and approve the payment above, giving my permission to immediately begin work. My signature also confirms my understanding and agreement to all terms listed on the following pages. Recurring payments may post any time between the 1st and 8th of the month. I understand for recurring fees, I am authorizing regularly scheduled charges to my checking/savings account or credit card and I will be charged the agreed upon amount as indicated by email for each billing period. For ACH debits to my checking/savings account, I understand that because these are electronic transactions, these funds may be withdrawn from my account as soon as the above noted periodic transaction dates. Should a return charge due to Non Sufficient Funds (NSF) occur, I understand that One Stop Consulting Shop, LLC may at its discretion attempt to process the charge again within 30 days, and agree to an additional \$25 fee for each attempted returned NSF. I acknowledge that the origination of ACH transactions to my account must comply with the provisions of U.S. law. I certify that I am an authorized user of this credit card/bank account and will not dispute these scheduled transactions with my bank or credit card company; so long as the transactions correspond to the terms indicated in this authorization form. Dispute due to disagreement of end product may result in further fees or legal action. This authorization will remain in effect until I cancel it in writing through email. Any changes to or additional fees communicated to me through email will be considered approved unless I disagree in writing by email within 3 business days. Bookkeeping and Subscription fees for the first month are non-refundable and considered set-up charges and will be drawn on the date of signature. The first invoice will be billed upon sign-up and subsequent months billed in advance on the 1st for each month.

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- 50% Non-Refundable Tax deposits are required to begin tax preparation work; balances due will automatically be drafted to the account on file when the draft return is sent to you. You will be charged upon completion of the return to this card on file and understand funds must remain available after authorization to begin work. It is understood work could be completed several months after a deposit is initiated depending on scheduling and extensions. Tax return extension fees are applied to cost of return unless a return is not completed in that year.
- The client affirms that all communications with One Stop Consulting Shop will be accurate and truthful.
- We never charge our recurring bookkeeping and tax clients for consultation or conversation!
- Only special projects are billed on a per hour basis and fees will be reviewed prior to commencement. Catch up bookkeeping from the first of the year is considered a catch up project after February.
- Our primary source of communication is email. You must frequently check for notices, questions, updates and communications. Any requests must be made via email.
- Sensitive information should be uploaded to our portal and never emailed. When using the portal, a follow up email should be sent to lfivey@onestopconsultingshop.com to ensure we are notified of the upload.
- The monthly report you receive is for management use only and is not considered “audited” or reviewed according to generally accepted auditing standards. This means monthly reports cannot be used to obtain a loan or provided to a financial institution as “audited financials”. Monthly Reports are compiled and considered a draft until such time as you confirm their accuracy and your tax return is finalized.
- The QuickBooks file we use is the property of One Stop, unless a QBO file (online) is used. Back up files of QB Desktop will not be provided to clients; however, all data will be provided via PDF and Excel.
- It is the client’s responsibility to fully review all emails/reports and notify us of any changes, errors, personal transactions, cash deposits, loans or personal deposits, and fixed asset purchases.
- The data provided to us by the client (which includes downloaded transactions from bank and/or credit card statements, Paypal and other 3rd party software transaction detail and emails) is used to prepare monthly reports and will not be relied upon to disclose errors, fraud, or other illegal acts. It is the client’s responsibility to adopt a sound accounting system for the safeguarding of assets, for authorizing transactions, for retaining supporting documentation if audited, and for maintaining internal controls.
- One Stop Consulting Shop LLC is a paperless office and is under no obligation to keep and preserve documents for you. You agree that any documents in our possession upon conclusion of your engagement or project may be destroyed or otherwise disposed of. It is the clients’ responsibility to retain all original documents and make a scheduled appointment for pick-up within 30 days of project completion. The client agrees to waive any liability or responsibility whatsoever for interception or unintentional disclosure of emails transmitted by One Stop in connection with the performance of any engagement.
- One Stop Consulting Shop LLC will assist clients with data entry for payroll services in 3rd party software however it is the client’s ultimate responsibility for all payroll, liability, error and tax related matters.
- It is the client’s responsibility to be familiar with state laws and insurance requirements including workers compensation, annual LLC reporting requirements, BOIR requirements and other local licenses and permits needed for their specific industry.
- Tax Returns will not be e-filed until paid in full and until a signed authorization is provided. Requests for extensions of time must be submitted with at least 7 days’ notice prior to a deadline. One Stop utilizes third-party tax professionals that are either EA or CPA licensed. Each client is responsible for the accuracy of their return including typos or numerical errors. Clients may be asked to show back-up documentation to substantiate deductions and credits. A Tax Return Extension (of time) is NOT an extension for payment. If estimated taxes are not paid and tax is due, penalties and interest will accrue from the original due date. Estimated tax payments are the client’s responsibility and must be reported at the time of tax preparation.
- One Stop has the right to suspend services or to withdraw from this or any engagement in the event that any invoices are deemed delinquent. In the event that any collection action is required to collect unpaid

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balances due us, the client agrees to reimburse One Stop for the costs of collection, including attorneys' fees. If clients have a payment plan for a service already rendered and choose to leave One Stop, the client is still required and responsible to pay the balance due in full and any payment plan will cease.

- Clients must compensate One Stop for any involvement and related fees for responding to subpoena, court order or other legal process requiring testimony or the production of documents. Any client with a payment plan must pay the balance due in full should services be terminated at the time of termination.
- Clients must provide notices from any Taxing Authority to One Stop within 72 hours of receipt via email or sharefile (text is unacceptable). An untimely delay of forwarding information may result in a client's accrual of IRS penalties and interest. One Stop Consulting Shop was created to help our clients understand and improve their accounting and tax situation.
- One Stop Consulting Shop LLC does not perform CFO or legal services for its clients, nor does it provide financial investment advice. Any financial or legal question will be directed, as a referral, to a trusted firm that is licensed and insured for these specific types of questions and services. One Stop Consulting Shop LLC will not be held responsible for any liability or issue arising from any referrals that we make.
- At no time will One Stop Consulting Shop LLC provide "comfort letters" to mortgage companies that make any forecast or promise of future profit. Letters will only include tax return and ownership verification.
- Should audited, reviewed or GAAP Compliant financials be required for banking or other financial institutions, One Stop Consulting Shop will refer the client to a licensed and insured CPA firm that handles these projects which would be independently completed.
- As it relates to business compliance, the client is responsible for any and all compliance requirements associated with their business. While One Stop Consulting Shop will do its best to send reminders and updates to clients, the sole responsibility for execution is with the client and it is the client's responsibility to review final documents that have been filed by One Stop Consulting Shop LLC for verification and record keeping.
- All paper documents received from clients by One Stop Consulting Shop must be returned to the client by December 31st of the following tax year or they will be shred. It is the client's responsibility to request these documents be returned and schedule pick up or delivery services. Delivery services will incur an additional postage fee.
- Digital copies of all documents received by One Stop Consulting Shop will be maintained in an encrypted file system for seven (7) years.

Our mission IS your business – from start-up to success!