

Simple, Effective, Affordable Solutions!



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

Please select: **One Time Payment** _____

Recurring Payment _____

*We believe in transparency and 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. **For payments, we offer clients the CHOICE to use cash (check & ACH) or other methods (credit cards). All quoted fees INCLUDE a Cash Discount. There will be a 3.9% charge added to your quoted fee upon processing for all other payment methods.***

Please complete the information below:

I _____ authorize One Stop Consulting Shop, LLC to charge my
(Credit Card / Checking Account) indicated below for \$ (_____) on _____ or if this is a
recurring payment, between the 1st and 5th of each month.

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 _____

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. I affirm that all of my communications with One Stop Consulting Shop will be accurate and truthful. Any additional fees I am informed of through email will be considered approved unless I disagree in writing within 3 business days. This authorization will remain in effect until I cancel it in writing. Recurring payments may post between the 1st and 5th 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 amount indicated above each billing period and/or through email exchange. 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debits to my checking/savings account, I understand that because these are electronic transactions, these funds may be withdrawn from my account as soon as the above noted periodic transaction dates.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. Bookkeeping and Subscription fees for the first month are non-refundable and considered set-up. The first invoice will be billed upon sign-up and subsequent months billed in advance on the 1st for each month. 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 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 the cost of the return unless a return is not completed in that year.

Engagement & Payment Authorization Terms

Simple, Effective, Affordable Solutions!



Our team believes in transparency in all our communications and operations. Please read the following points that outline our Fees and Terms of Engagement. An additional engagement letter is required for tax preparation.

- 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.
- We offer customer choice dual pricing. All listed/quoted fees include a 3.9% cash discount.
- Our primary source of communication is email and should be frequently checked for notices, questions, updates and communications. Any requests must be made via email. Sensitive information should be uploaded to our portal and never emailed.
- 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.
- Clients must retain all original documents and make a scheduled appointment for pick-up. 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 and other local licenses and permits required.
- 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 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.
- 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.