



A Division of Montecito Financial Services, Inc.
300 West Glenoaks Boulevard, Suite 200 Glendale, CA 91202
Phone: 818.242.4888 | Fax: 818.242.1060

I, THE UNDERSIGNED, DO SAY AND DECLARE THAT:

- 1. I will execute my 2020 federal and state income tax returns with attached Schedule C for my small business, prepared by Robert Hall and/or Robert Hall and Associates...
2. I have been instructed to retain copies of the returns for my records indefinitely...
3. My 2020 Income Tax Returns are to be prepared on the basis of information supplied by me to the Firm...
4. I have been advised by Robert Hall & Associates that there is a decreased audit risk by setting up some type of entity...
5. I agree to send a copy of any audit notification, as well as a copy of any other correspondence received from either the IRS or State during the year...
6. I understand that although the return represents the best of the preparer's professional opinions, the preparer cannot guarantee the result...
7. Written notice must be provided to the Firm to disengage services...
8. I will pay fees for preparation of returns upon initial preparation interview or within one month of receipt of my returns...
9. In the event of a dispute between the Firm and the Taxpayer, the parties hereto agree that any disputes, controversies, or claims between them concerning...
10. Taxpayer agrees to hold harmless the Firm and each of its respective officers, directors, employees, agents, counsel and representatives from any and all liability associated with utilization of third party electronic tax filing entities.
11. I operate in the following states: I operate in the following cities:

DATE TAXPAYER

PRINT NAME SPOUSE

PLEASE READ CAREFULLY, SIGN AND RETURN