

Fixed Price Agreement

In order to document the understanding between us as to the scope of the work that **SOOBOW/Tax**Solutions will perform, we are entering into this Fixed Price Agreement (FPA) with you. To avoid any misunderstandings, this FPA defines the services we will perform for you as well as your responsibilities. This FPA is an addendum to our Engagement letter.

PROFESSIONAL SERVICES

We will provide the following services for you during the subscription period to :

- Semi-annual tax planning meetings (up to one hour each).
- 2 paycheck withholding calculation reviews
- Preparation of your 20 federal and California state business tax returns.
- Preparation of your 20 federal and California state individual income tax returns.
- Unlimited email and telephone support to discuss tax matters including life events and changes, and any other topic at your discretion.

Because our FPA provides ongoing access to the tax advice you need on a fixed price basis, you are not inhibited from seeking timely advice by the fear of a meter running endlessly. Our program is built around one price pricing, as opposed to hourly rates, and offers you access to the accumulated wisdom of the firm through professionals with substantial experience, who can help enhance your financial future and achieve your goals.

While the fixed price entitles you to unlimited consultation with us, if your questions or issues require additional research or analysis beyond the consultation, that work may be subject to an additional price negotiation before the service is to be performed, utilizing a Change Order.

RESOURCE REQUIREMENTS

The ultimate success of any tax planning meetings and/or withholding calculation reviews will hinge upon your involvement and participation. You may be asked to provide information and documentation to assist us.

UNANTICIPATED SERVICES

Furthermore, the parties agree that if an unanticipated need arises (such as, but not limited to, an audit by a taxing agency or any other service not anticipated in this FPA by the parties) that **SOOBOW/Tax** Solutions hereby agrees to perform this additional work at a mutually agreed-upon price. This service will be priced separately to you utilizing a Change Order.

SERVICE AND INVESTMENT GUARANTEE

Our work is guaranteed to the complete satisfaction of the customer. If you are not completely satisfied with the services performed by Allworth Tax Solutions, please notify us immediately. Upon final payment of the terms in this FPA, we will assume you have been satisfied. Furthermore, if you ever receive an invoice without first authorizing the service and/or the price, you are not obligated to pay for that service.

FEE AND PAYMENT TERMS

Your total fee for the above services is \$. You and **SOOBOW/Tax** Solutions hereby agree to the following payment plan: 12 monthly payments of \$ beginning 11/1/2013. Payments will be made through automatic recurring checking account withdrawals (EFT/ACH).

AUTOMATIC RENEWAL

Furthermore, it is understood that at the end of the initial PERIOD noted above, your subscription to the FPA will automatically renew for an additional 12-month period. This automatic 12-month renewal will continue unless either party terminates this FPA in writing. If there is a change to the fee for a new 12-month period, you will be notified 30 days in advance.

It is also understood that either party may terminate this FPA at any time, for any reason, within 10 days written notice to the other party. It is understood that any unpaid services that are outstanding at the date of termination are to be paid in full within 10 days from the date of termination.

If you agree that the above adequately sets forth your understanding of our mutual responsibilities, please authorize this FPA and return it to our office. We appreciate the opportunity to help you.

The above agreement in its entirety including the scope of engagement and responsibilities and arbitration clause is understood and accepted by:

[TAX PAYER'S SIGNATURE]

[PRINTED NAME]

[DATE]

[TAX PAYER'S SIGNATURE]

[PRINTED NAME]

[DATE]