

CHICAGO TAX PREPARATION DISCLOSURE

_____ **Tax Preparation Fees:**

(Taxpayer Initial)

Tax preparation fees are determined and charged based upon the complexity of the tax return. You will have the opportunity to review all fees associated with your tax return. Minimum income tax preparation fees:

Federal Forms 1040

Federal

State

_____ **Miscellaneous fees that may apply:**

(Taxpayer Initial)

Data and Document Storage Fee

Worry-free Guarantee(s)

Assisted Refund - Assisted Refund Fee **\$54.95**

_____ **Written Estimate:**

(Taxpayer Initial)

Based upon a review of the documentation and information provided in our introductory conversation, we estimate the total charge for tax preparation service to be _____. Your actual charge will be determined during our full tax preparation interview. Prior to entering into any contract, the tax preparer will provide you with a written estimate of the total charge to you based upon the tax preparation services selected by you to purchase.

_____ **fund Timing Estimate:**

(Taxpayer Initial)

According to the IRS, 9 out of 10 refunds will be issued in less than 21 days. However, if your return contains Earned Income Tax Credit and/or Additional Child Tax Credit, the IRS will issue your refund no earlier than February 27, 2024.

My tax preparer has verbally reviewed the above disclosures with me.

(Taxpayer Signature)

Date

I certify that I have reviewed the above disclosures with the consumer and I have verbally reviewed all other required disclosures with the consumer.

(Taxpayer Signature)

Date