

Retainer Policy

Business accounting, financial reports and consulting services:

We will estimate the expected fee amount for our engagement, based upon the terms of the engagement.

Before we begin work on the engagement, we must receive payment equal to 50% of the expected fee. The remainder of the actual total fee must be paid upon completion of the engagement, prior to the delivery of any report or other document produced in the engagement.

Tax return preparation services - current year tax returns:

The total actual fee must be paid prior to delivery of the completed tax returns.

Tax return preparation services - prior year tax returns:

Before we begin work on the engagement, we must receive full payment of the estimated amount of the fee. Any unpaid remainder of the actual total fee must be paid prior to the delivery of the completed tax returns.

Tax representation services (audits, problem resolutions, etc.):

Before we begin work on the engagement, we must receive a retainer equal to 75% of the estimated amount of the expected fee. Once the retainer has been consumed, periodic progress billings will be presented; due and payable 10 days from invoice date.

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