



BUSINESS TAX SERVICE AGREEMENT

Business EIN: _____ Business Start Date: _____

Business Name: _____

Business Address: _____

Business Type: _____

Business Phone: _____ Business Fax: _____

Business Email: _____

Check All That Apply

- Sole Proprietorship
 Partnership
 Corporation
 Non-Profit Org.
 General
 Limited Liability Company (LLC)

	Owner/Partner #1	Owner/Partner #2	Owner/Partner #3	
Name				
Social Security #				
Address				
Phone Number				
Email				
The Following Questions are for Partnerships only:				
Partner Representative (select one)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Percentage Breakdown of:	Profit	%	%	%
	Loss	%	%	%
	Capital	%	%	%

Business Name: _____ Business EIN: _____

Provide the following items:

- **Provide the following:**
 - **Balance Sheet**
 - **Profit and Loss Statement**
- **If any vehicles were purchased for the business, please provide the following Information**

Year, Make and Model	Vehicle Type	Date Purchased	Cost of Vehicle	Lease Rent Own	Monthly Lease/Rent	Will this vehicle be used for Personal Use

If we need additional information, we will contact the owner or the Partner Representative via email and phone.

I, _____, certify that I am a legal representative of the business undersigned to this agreement. I agree to provide Boze Bookkeeping, LLC with all documents needed to prepare my company's taxes for the appropriate business type selected above. This agreement is binding; however, this agreement can be terminated if I do not provide the necessary documents to Boze Bookkeeping, LLC in a timely fashion to prepare the appropriate tax return. I will not hold Boze Bookkeeping, LLC liable for any financial liabilities due to my withholding or misrepresentation of any documents needed to provide accurate service to my business.

I agree to give Boze Bookkeeping, LLC 30-day notice to terminate this agreement if I am dissatisfied with the services provided or will no longer operate this business. I understand that Boze Bookkeeping, LLC may terminate this agreement with a 30-day notice if they are dissatisfied with my ability to provide documents needed to provide agreed upon services. I also understand that Boze Bookkeeping may terminate this agreement immediately upon the discovery of any falsified documents provided.

I agree to Boze Bookkeeping, LLC Non-Disclosure Policy Below:

A. Purpose. Boze Bookkeeping, LLC acknowledges and agrees that Confidential Information supplied by the Disclosing Party is being made accessible solely on the understanding that the knowledge derived therefrom is to be used exclusively for the purpose of evaluating the business for a potential proposal, transaction, negotiation, investment, or other business opportunity and the terms thereof shall be written out in a separate agreement.

B. Confidentiality. Boze Bookkeeping, LLC agrees not to disclose Confidential Information to any third party (individual, company, corporation, or other entity) or to use Confidential Information for any purpose other than the reasons mentioned in section (A) of this article. Boze Bookkeeping, LLC further agrees not to disclose the fact that Confidential Information has been exchanged, that discussions or negotiations are taking place concerning any potential transaction or investment, or any of the terms or conditions of this Agreement.

Business Name: _____ Business EIN: _____

C. Representatives. Boze Bookkeeping, LLC shall limit the availability of Confidential Information to its employees and representatives who have a need to know, and who are directly involved in the evaluation of the business and any potential transaction. It is the duty and responsibility of the Boze Bookkeeping, LLC to inform each person to whom Confidential Information is transmitted that the information is confidential and that its use and disclosure are subject to the terms and conditions of this Agreement.

D. Legal Disclosure. Boze Bookkeeping, LLC may be required by law (through court or administrative order, subpoena or other such legal proclamation) to disclose Confidential Information for the purposes of aiding or taking part in a case involving a violation of the law. Boze Bookkeeping, LLC shall, if legally permissible, promptly notify the Disclosing Party of any such demand for disclosure so that the Disclosing Party may seek to make such disclosure subject to a protective order or other appropriate remedy to preserve the confidentiality of the Confidential Information. Notwithstanding the foregoing, if the Disclosing Party is unable to obtain a protective order, the Boze Bookkeeping, LLC may be compelled to disclose such Confidential Information and will not be held liable.

Signature: _____ **Date:** _____

Print Name: _____ **Title:** _____

Office use only:

Type of Tax to be prepared: _____ *Date Recv'd:* _____

Assigned Preparer: _____ *Preparation Fees:* _____