



Consulting Engagement

Thomson Accountants, Inc. provides consulting for complex tax inquiries for matters related to individual or business tax planning, business structure and taxation, accounting services, planning for past year filing compliance, or tax notices.

Fee Structure for Consulting Services:

30 Minute Consultation: \$150

60 Minute Consultation: \$300

APPOINTMENT SELECTION: *Scheduling will start at 30 minutes unless prior arrangements have been made.*

Office visit Phone Call Zoom Meeting

PAYMENT AUTHORIZATION: **Choose **ONE** option below to authorize payment for your Consulting Services.*

Consulting fees are payable at time of service unless prior arrangements have been made.

***OPTION 1: Checking/Savings account for electronic debit (No Fee)**

Name of Financial Institution: _____

Name on Account: _____

Account Type: Checking Savings

Routing Number: _____

Account Number: _____

***OPTION 2: Credit Card *Visa and Master Card Only (3.5% Convenience Fee)**

Card Type: Visa MasterCard

Name on Credit Card: _____

Credit Card Number: _____

Expiration Date: _____/_____/_____ CVC (3 digits): _____ Billing Zip Code: _____

CONTACT INFORMATION: **If leaving any hard copy documents at the office, please provide your mailing address.*

Name: _____

Phone: (_____) _____ - _____

Email: _____

*Mailing Address: Street: _____

City: _____ State: _____ Zip: _____

TAI understands and acknowledges that the information supplied by the Owner is confidential and will not disclose any information to any third party or person unless written authorization is provided by the Owner. If the foregoing fairly sets forth your complete understanding of this Consulting Engagement, please sign below.

Signature: _____ Date: _____