



## Consulting Engagement

Thomson Accountants Inc./ Baer Tax Group (BTG) 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: \_\_\_\_\_

BTG 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: \_\_\_\_\_