



THE TAX MAN

1800 Hamilton Ave. Suite 220
San Jose, CA 95125
Phone: (408) 445-1151

Our Commitments to Each Other

Our Team's Commitments to You:

- ❖ We will act with integrity, honesty and openness in everything we do for and with you.
 - ❖ We will absolutely respect the confidentiality of our working relationship.
 - ❖ Our team will return phone calls and e-mails within 2 business hours.
- ❖ Randy will return calls and e-mails within 24 hours during tax season and within 2 business hours the rest of the year.
- ❖ We will meet the deadlines we set. (In case of circumstances out of our control, we will let you know the new deadlines.)
- ❖ You will be informed of our billing rates and policies. You will be quoted a fixed fee for your tax return. This fixed fee will be adjusted if your return changes after your interview due to additional information and/or work needed for your return.
- ❖ You are the judge of our performance. If anything we do falls short of your expectations, we will do what is necessary to obtain your satisfaction.

Your Commitments to Us:

- ❖ You should be open and honest with us at all times.
- ❖ You should let us know immediately of any concerns you have about our work. (If you are unhappy with us for any reason, please tell us immediately so we can resolve the situation.)
 - ❖ You will return e-mails and phone calls within 24 hours.
- ❖ You will give us all the information we need to do the work you have hired us to perform. You will give us access to you or your team within the time frames we agree upon.
- ❖ You will make time available to work on gathering information we need to finish your return.
 - ❖ You will send us your needed information only once you have it all.
- ❖ You agree to listen to any advice we offer (and we acknowledge your right to reject that advice).
- ❖ You will consider referring us to at least two other business or individuals whom you believe would benefit from an association with us.