

Family Roots Tax Co. LLC

Client Intake & Fee Acknowledgment

Client Information

Full Name:	
Email:	
Phone:	

Tax Situation (check all that apply)

- ☐ W-2 Income
- ☐ Self-Employed / Schedule C
- ☐ Owe Taxes / No Refund Expected
- ☐ Multiple Jobs or Income Sources

Schedule C Complexity (if applicable)

- ☐ Moderate Schedule C (\$630)
- ☐ Complex Schedule C (\$780)

Fee Acknowledgment

I understand that tax preparation fees are based on complexity, time, and required forms. I acknowledge the base pricing structure and understand that additional fees may apply if my return requires additional work beyond the standard scope.

Client Signature:

Date: