

RIVERSIDE VAULT, SARAH AGUIRRE

Terms & Conditions

Prices will be determined with a quote prior to services rendered. A custom engagement letter will be created to identify the specific services necessary for the contract. The specific cost will be listed and agreed upon. All engagement letters include the following information:

I will prepare the tax returns from information you furnish me. I will not audit or otherwise verify the data you submit although I may ask you to clarify some of the information. I am not responsible for returns prepared by other preparers. If you have taxable activity in a location other than your resident state, then you are responsible for notifying me of this new regional activity. I may inquire about previous tax returns, however engagements are strictly limited to one calendar year. Amending prior years would require a different engagement letter agreement. It is firm policy to keep records related to your tax return for four years after which they are destroyed.

If I do not receive all necessary information in a timely manner it is my policy to put the tax return on extension. This may result in additional interest and penalties. I cannot guarantee a timely tax filing if I do not receive all necessary correspondence and documentation at least 8 business days before the return filing deadline.

Taxpayer Responsibilities

It is your responsibility to maintain, in your records, the third party documentation necessary to substantiate the data used in preparing your tax returns. This includes but is not limited to business banking records, charitable donation receipts and vehicle mileage reports.

There are high penalties for failure to disclose foreign financial accounts having an aggregate value exceeding \$10,000. You must provide me with information regarding foreign assets and bank accounts to ensure accuracy in tax return reporting and avoid these penalties.

If items of income are omitted from your correspondence during this engagement then you understand that the tax practitioner is not responsible for this omission. Your tax returns will include all relevant information from the data that you provided to me. Failure to disclose income or business activities may result in additional taxes, interest and other penalties.

You agree to immediately notify me upon receipt of any notice or correspondence from any government agency regarding your tax liabilities for returns that I have prepared. Delays in replying to government inquiries may result in additional taxes, interest and other penalties.

Payments for tax return preparation are due upon final e-filing of the tax return. Bookkeeping engagements are covered by separate engagement letter agreements. They are billed on the final Friday of each month. Payments become delinquent if not paid within 30 days of the billing date.

Debit and Credit Card payments are processed by WIX. Their terms and conditions can be found here: <https://www.wix.com/about/terms-of-use>

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2026 Privacy Policy

By law all tax practitioners are required to exercise due diligence in handling confidential data from their clients. The IRS Office of Professional Responsibility document Circular 230 outlines the industry standards criteria for document retention and data security. It is updated frequently.

To comply with Circular 230 Riverside Vault has implemented strict procedures to protect all files used in the preparation of your tax returns. This includes 2 factor authentication, VPNs, antivirus software, firewalls, limited access to hardware, employee background checks, and the use of a highly vetted cloud archive. It is also firm policy for the owner to take continuing education courses on potential security threats annually.

The firm utilizes Quickbooks/Intuit client portal software. It's a collaborative, virtual workspace in a protected, online environment. This client portal permits real-time collaboration across geographic boundaries and time zones. It allows Riverside Vault and you to share images, documentation, engagement information, knowledge, and deliverables in a protected environment.

All sensitive communication will be conducted through this industry standard Quickbooks/Intuit portal. Sharing any confidential information via other apps or communication is highly discouraged. If you decide to transmit your information to us in a manner other than this secure portal, you accept responsibility for any and all unauthorized access to that confidential information. This includes responsibility for any liability including but not limited to, (a) any loss or damage of any nature, whether direct or indirect, that may arise as a result of our sending confidential information in a manner other than our approved secure portal, and (b) any damages arising as a result of any virus being passed on or with, or arising from any alteration of, any email message.

Tax practitioners are prohibited from disclosing any information to outside parties without express written consent from the client. This includes other advisory parties that you may consult with such as lenders, attorneys and business consultants.

During audits and investigations state, federal and foreign regulators may request access to or copies of certain workpapers pursuant to applicable legal or regulatory requirements. The firm will work in collaboration with the client to comply with all regulatory inquiries. During these proceedings if there is a total loss of communication within the given deadlines, I may construe your inaction or failure to communicate as consent to comply with the request.

Please direct all inquiries regarding firm security to Admin@RiversideVault.com
-Sarah Aguirre, Enrolled Agent & CEO of Riverside Vault