



Agreement for Services

Services

Coaching

Clients are able to speak to someone about their finances and have their questions, answered and their concerns, eased. When setting an appointment, best practice is to inform representative what is the desired topics for the session so that the advisor can be most efficient.

Fee. A \$25 non-refundable fee is charged per session.

Bookkeeping

There are two main packages offered. Package 1 is one session. Clients will have an in-depth meeting outlining their income versus expenses to create a budget or tracking system for them to follow when LPF is not there to monitor their finances. Package 2 is a monthly session (or period of time to be determined by you, more than every 2 months). Clients will also have an initial in-depth meeting. Then LPF will also update the system monthly and remind Clients of important bills, debts, savings, and goals as these are important aspects of a good financial plan.

Fees. Package 1 is \$100. Package 2 price varies depending on time period but the first month is \$100 and for monthly updates \$25 per month. Price goes up the more time you put in between updates.

Accounting

LPF offers accounting services to small businesses and non-profits.

Fees. Price will vary from \$100 to \$400 a month based on your business's needs. A free consultation meeting is conducted to assess those needs.



Tax Preparation

LPF provides tax preparation counseling by reviewing previously submitted taxes and information from coaching or bookkeeping session. We prepare personal and business taxes.

Fees. For simple preparation (1 to 2 forms) \$100. For complicated taxes \$200 (3 to 5 forms). For more complicated taxes \$300 (5 or more forms).

**Cases can be made for financial hardship and sliding scale accommodations can be discussed.*

Agreement

Client agrees to allow Legacy Personal Finances to provide them financial services beginning at the date of services until Client or LPF chooses to terminate business relationship. Client can choose to terminate relationship at any time.

Print Name: _____

Signature: _____

Date: _____

Print Name: _____

Signature: _____

Date: _____