

Engagement Agreement

CLIENT INFORMATION

Client / Business Name: _____
EIN / SSN: _____ Entity Type: _____
Fiscal Year End: _____ Primary Contact: _____

Services & Fees

SERVICE	FREQUENCY	FEE
Bookkeeping	Monthly	\$_____/mo
Payroll Processing	Per Pay Period	\$_____/mo
Tax Preparation (Business)	Annual	\$____
Tax Preparation (Individual)	Annual	\$____
Quarterly Tax Planning	Quarterly	\$_____/qtr
AZ TPT Filing	Monthly / Quarterly	\$_____/filing
Insurance Review	Annual	Included
IT Services (per device)	Monthly	\$_____/device

TOTAL MONTHLY RECURRING \$_____/mo

Terms

- Billing occurs on the 1st of each month via Stripe. Past-due balances accrue a 1.5% monthly late fee.
- Either party may terminate with 30 days written notice. Fees for work completed remain due.
- OmegaOS maintains professional liability insurance and adheres to AICPA standards.
- Client authorizes OmegaOS to communicate with the IRS, AZDOR, and payroll agencies on their behalf.
- All client data is handled per our Privacy & Data Consent policy (signed separately).

Client Signature _____ Date _____

For OmegaOS _____ Date _____