Ledger Pro — Service Level Agreement

Individual — Basic (Form 1040, Standard Deduction)

This Service Level Agreement ("SLA") describes the scope, responsibilities, timelines, and terms for the tax package selected below. By paying for the package and providing documents, the client agrees to the terms herein.

Package	Individual — Basic (Form 1040, Standard Deduction)
Price Reference	Flat package shown on site ($335). Built from QBO items: IND-F1040-STD + BUS-FEE-ADD

1) Scope of Work

• Prepare and e■file Federal Form 1040 using the standard deduction.

• Intake review and organizer; confirm filing status and dependents.

• Reconcile up to 3 wage/interest/dividend information statements (e.g., W■2, 1099■INT/DIV).

2) Deliverables

• Draft Form 1040 PDF for review and approval.

• Secure e■file submission to the IRS; electronic confirmation.

• One revision cycle based on client feedback (non■structural changes).

3) Timelines & Turnaround

• Standard: 5–7 business days after all requested documents/information are received.

• Rush: 1–2 business days (+$150), subject to availability.

• Clock pauses while waiting for client responses.

4) Add■Ons (Priced Separately)

• State return (per state) +$200.

• Itemized deductions (Schedule A) upgrade → consider Premium package.

• Crypto import, HSA/ESA complexities, amended returns, or prior■year pulls.

• Year■round notices support beyond 30 days.

5) Exclusions

• Schedules C, D, or E; multi■state filings; complex credits not listed.

• Bookkeeping/categorization beyond simple wage/interest items.

• Audit representation beyond correspondence letter replies.

6) Client Responsibilities

• Provide complete and accurate documents in a timely manner.

• Respond to information requests within 3 business days.

• Review draft return for accuracy before e■file authorization.

7) Support & Revisions

• Email support during preparation and for 30 days after e■file acceptance.

• One revision cycle included; additional revisions billed at hourly or add■on rate.

8) Data Security & Privacy

Ledger Pro maintains reasonable administrative, technical, and physical safeguards for client data. Documents are exchanged via approved secure methods (e.g., Encyro/Google Drive upload, password■protected email attachments where applicable). We do not store payment card data. Client agrees not to transmit SSNs or bank details over unencrypted channels.

9) Fees, Invoicing & Refunds

• Payment due upfront via site link (QBO/PayPal). Work begins after payment and receipt of documents.

• Fees cover preparation only; government taxes due are paid by the client.

• Refunds: If we have not started work, a full refund is available. After work starts, refunds are prorated based on efforts completed.

10) Errors & Indemnification

If an error made by Ledger Pro results in IRS/state penalties or interest, we will reimburse up to the amount of the service fee paid for the affected filing. We are not responsible for penalties, interest, or assessments arising from incomplete, late, or inaccurate information supplied by the client, or from changes in tax law after filing.

Acceptance of Terms

Client acceptance occurs upon payment for the package and provision of documents. For questions about this SLA, contact taxes@ledgerpro.net.