

Ledger Pro — Service Level Agreement

Individual — Premium (Itemized 1040 + Schedule D or E)

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 — Premium (Itemized 1040 + Schedule D or E)
Price Reference	Flat package shown on site (\$658). Built from QBO items: IND-F1040-ITEM + (IND-SCH-D or E)

1) Scope of Work

- Prepare and efile Form 1040 with Schedule A (itemized deductions).
- Include ONE of: Schedule D (capital gains) up to 150 sale lines OR Schedule E for 1 rental property.
- Coordinate 1099-B consolidated statements and basis reporting OR rental income/expense worksheet.

2) Deliverables

- Draft return PDF; efile submission and acceptance notice.
- One revision cycle for corrections or missing items.

3) Timelines & Turnaround

- Standard: 7–10 business days after complete docs.
- Rush: 2–3 business days (+\$150).

4) Add-ons (Priced Separately)

- Both Schedules D and E in same year (adds second schedule fee).
- Additional rentals, multi-state, K-1s, HSA/ESA, AMT calculations.
- Crypto import beyond 200 lines; amended returns.

5) Exclusions

- Business entity returns (1065/1120S/1120) and Schedule C.
- Active trader mark-to-market elections or complex wash sale reconciliations beyond broker summaries.

6) Client Responsibilities

- Provide broker 1099-B statements or transaction exports; rental ledgers and asset details.
- Timely responses to document requests; review/approve before filing.

7) Support & Revisions

- Email support during preparation and 45 days post-filing.
- One revision cycle included; extra revisions/additional schedules are billable.

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. Add-ons quoted before work proceeds.
- Refunds prorated after work begins; rush fees non-refundable once booked.

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.