

1 HOUR CONSULTATION AGREEMENT AND INSTRUCTIONS

A telephone conference consultation can be scheduled with J. Ben Vernazza, CPA/PFS, TEP and Liz L Flores, CPA/PFS, TEP or with other allied professionals as required by your circumstances.

The duration of the telephone conference consultation is one hour.

During the consultation we can address your goals and objectives, provide general answers to most of your question and discuss the pitfalls to avoid. After understanding your objectives and goals, we can discuss the services that we or our allied professional can provide, the typical costs involved and a general implementation schedule.

The fee for the consultation is \$650 in advance. You can wire or send the funds to us.

Once they are received we will contact you to setup a mutually convenient time.

Before the schedule consultation we ask that you complete and return the *Questionnaire* and *Waiver of Liability for Phone Consultations*.

1 Hour Consultation Services Questionnaire

Click Submit – To Send Completed Questionnaire.

Or Completed Questionnaire can be:

Email: Liz@oversight-group.com

Fax: (831) 401-2544

Mail: Oversight, LLC
30 Silver Birch Ln
Scotts Valley, CA 95066

Contact Information

Your Name _____
Spouse's Name _____
Address _____
City _____ ST _____ Zip _____
Phone (____) _____ - _____ Fax(____) _____ - _____
Email address _____
Web site <http://www> _____

Preferred form of communication ___ phone ___ email ___ fax

If you are or have been married, are you divorced, separated
or estranged from your spouse? _____

If you are inquiring on behalf of a business, please provide
the following information and provide a description of the
kind of business and your position with the company.

Company Name _____
Address _____ Suite _____
City _____ ST _____ Zip _____
Phone (____) _____ - _____ Fax(____) _____ - _____
Email address _____
Web site <http://www> _____

Your position with the company _____

Form of Business: ___ C Corp, ___ S Corp, ___ Partnership, ___ LLC

Is the company involved in any international activities? _____

Please Describe what kind of help the company needs

If you are seeking personal tax assistance.....

Are either of you self employed or a principal in a business?

Yourself _____

Spouse _____

Your Employment Information/Description

Spouse's Employment Information/Description

Children's Name	Birth date	Married?	Occupation
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_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Grandchildren Name	Birth date	Married?	Occupation
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_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Should we assume that you have a normal (functional) relationship with your children or grandchildren for the purpose of any family tax planning? If not, please comment, as appropriate.

Your Tax and Financial Objectives/Priorities

Please describe what result you would like to achieve from our services.

Please check any of the following items that of concern to you.

- Foreign tax questions or concerns**
- Emigration (Expatriation) tax issues**
- Tax services for foreign investments**
- Tax services for a foreign trust**
- Tax services for a foreign corporation/IBC**
- Tax services for a foreign LLC or partnership**
- Starting a Business**
- Selling a business**
- Personal income tax savings**
- Avoiding/deferring capital gains taxes**
- Investment tax concerns (other than capital gains)**
- Estate tax planning & preservation**
- Multi-generation estate preservation**
- Asset protection tax issues**
- Voluntary Disclosure/Amnesty**
- (Other)** _____

Additional Information That Will Help Us to Help You

You are welcome to send us as little or as much of the following information as you wish. The more you send us, the better our advice will be in relation to your specific circumstances.

Please send us a complete COPY of your latest personal and any business income tax returns. (Please do NOT send us your only copy.)

If you only need limited information based on a specific question about the tax law, you do not need to send us the following information. However, our answers are often dependent on facts that are specific to you and on information that we can obtain from a review of your tax and financial information. If you anticipate that you will want personal advice relating to your specific tax and financial situation, then the following information may be needed and it would save time to send it to us initially.

Please send us a copy of any personal financial statement or "financial plan" that shows the value of your assets, your present debts, any substantial income

you have that is not on your tax return and any major expenses you may have that are not reflected on your tax return - if you would like to know if there is a way to deduct them.

If you are concerned about capital gain taxes, we will need to know the present market value of the assets and the tax cost of those assets.

If you are concerned about estate taxes, we will need a copy of your wills, any trusts that you have established, any power of attorney that you have, any powers of appointment that you hold over any trusts, any inheritances that you are expecting and whether your children or grandchildren already have a substantial estate. We will also need information about your life insurance.

If you are concerned about the tax rules applicable to any foreign investment, trust or business operation, please send us an explanation of the situation and of your concerns.

Waiver of Liability for Phone Consultations

In order to give proper advice, we will need to have a detailed understanding of the clients personal and business circumstances as well as an in-depth knowledge of their past tax returns and financial information.

We will attempt to answer your questions to the best of our ability. However our responses will be limited to the information you provide and may not be accurate if you have not provided all of the pertinent or critical facts relevant to the issue.

We will only respond to questions about our understanding as to the meaning of the tax law relating to some international transaction. Any suggestion made as to the suitability of a particular transaction will be based on the information provided by the client. We will not be held liable if the client does not disclose all the pertinent or critical facts.

If you wish to retain our services please sign the waiver below and return it to us:

Waiver

I would like to retain you for a phone consultation. Based on the information stated above, I agree that if the information you provide should prove to be incorrect in any manner, my recourse will be limited to the amount of the fee I have paid and that you will not be responsible for any consequential damages to me, my family or my company.

Signed _____ Date _____

Name _____ Phone _____

Address _____

City _____ State _____ Zip _____

Email _____

CIRCULAR 230 NOTICE

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