

# BOOKS-SMART

## Engagement Letter and Billing Authorization

Contact name \_\_\_\_\_  
Company \_\_\_\_\_  
Address \_\_\_\_\_  
City, State, Zip \_\_\_\_\_  
Business Phone \_\_\_\_\_  
Mobile Phone \_\_\_\_\_  
Email \_\_\_\_\_

Thank you for your interest in using our services. We are a local consulting firm specializing in service to small businesses and individuals. We offer QuickBooks consulting, business/accounting consulting, training and bookkeeping services.

***In-person appointment rates; two hour minimum, plus trip charge where applicable:***

QuickBooks consulting by Amanda Douglass \$240/Hour

***Telephone/web-conference/other hourly rates; no minimum, no trip charge, ¼ hour increments:***

QuickBooks consulting by Amanda Douglass \$240/Hour

***Bookkeeping Services:***

Monthly & Quarterly Bookkeeping Services Hourly or As Quoted

We invoice at time of service, payment through automated credit card or bank debit authorization (Page 2). Our rates will change annually and current hourly rates are always published at [www.Books-Smart.com](http://www.Books-Smart.com).

We require a signed engagement letter and completed billing authorization prior to providing service. Please complete contact and billing information and return by email, upload, or fax. We look forward to working with you!

I accept the terms of this engagement: \_\_\_\_\_

Our privacy policy is at [www.Books-Smart.com](http://www.Books-Smart.com)

1812 Ardith Dr.  
Pleasant Hill CA 94523  
Phone/Text 510-612-8002

[www.Books-Smart.com](http://www.Books-Smart.com)  
ADproadvisor@Gmail.com  
Amanda@Books-Smart.com

# BOOKS-SMART

## Billing Authorization

I authorize Amanda Douglass/Books-Smart to charge the card below or debit the bank account below for the amount of professional services rendered or products ordered per invoice amount, consistent with engagement letter or other agreed terms. I authorize charge at time of service or product order. This authorization remains in effect unless canceled in writing.

Choose credit card or bank debit payment type:

### Credit Card

Credit card type:  Visa  MasterCard  American Express  Discover

Name as it appears on card \_\_\_\_\_

Credit card number \_\_\_\_\_

Card security code \_\_\_\_\_

Card expiration date Card \_\_\_\_\_

Billing street address Card \_\_\_\_\_

Billing city, state, zip \_\_\_\_\_

Signature/printed name \_\_\_\_\_

Date signed/effective date \_\_\_\_\_

### Bank Debit

Account type:  Business  Personal

Name on account \_\_\_\_\_

Bank routing number \_\_\_\_\_

Bank account number \_\_\_\_\_

Phone number on file with bank \_\_\_\_\_

Signature/printed name \_\_\_\_\_

Date signed/effective \_\_\_\_\_

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