

**Louisiana Sales and Use Tax Commission
for Remote Sellers**

Proposal for Professional Services

October 2020



October 27, 2020

Renee Ellender Roberie
Executive Director
Louisiana Sales and Use Tax Commission for Remote Sellers
Renee.Roberie@la.gov

Re: Proposal for Services

Dear Renee,

Enclosed is our proposal based on our discussions and understanding of your professional service wants/needs. As with any agreement of this type, the arrangements are based on the relationship and the value of the services to be delivered.

I enjoyed talking with you and learning about the project and believe that I have a good understanding of your wants and needs regarding accounting and advisory services.

The attached agreement attempts to more specifically enumerate the services and deliverables.

If you agree with this proposal, we ask that you sign and date the last page and either mail it or email it back to us.

Please feel free to discuss with us anything that is unclear to you in the proposed agreement. We look forward to hearing from you soon.

Thanks.

Yours truly,

Rebekah Summerville, CPA
Rebekah H. Summerville, CPA

enclosures

FIXED PRICE AGREEMENT

In order to document the understanding between us as to the scope of the work that McKey Business Group, CPAs will perform, we are entering into this Fixed Price Agreement with **Louisiana Sales and Use Tax Commission for Remote Sellers**. To avoid any misunderstandings, this Agreement defines the services we will perform for you as well as your responsibilities under this Agreement.

Scope of Services

McKey Business Group will perform the following services for you and your business:

1. Utilizing the Quickbooks software that has already been purchased, we will set up the "company" and the necessary chart of accounts to record transactions for operations and tax collections.
2. Set up and document systems and processes to reconcile Quickbooks, the system of record, and the return portal.
3. Define proper internal controls and segregation of duties among personnel.
4. Establish daily/weekly/monthly accounting duties among personnel.
5. Assist with defining duties and responsibilities for personnel and advise if any new hires are needed.
6. Unlimited reactive telephone or e-mail assistance to you and your team related to the matters outlined above.

Timeline and Delivery

We anticipate that our work outlined in this proposal will begin when this agreement is executed. Some of our work together will be in a meeting setting with discussion and collaboration, some will be "thinking" exercises in between our actual time together, and some will be work we perform in our office and your office. There will be an open line of communication during the entire process. Various notes and action items will be documented, monitored, and distributed by our team. We will periodically review together the agreement and scope of services in order to assure that we are "hitting the mark" related to your needs and wants.

Financial Investment and Payment Terms

The price for the above services will be **\$22,500**. As always, our progress and results will be monitored continuously throughout the engagement. We will bill at the completion of each phase outlined above in #1-6 of the Scope of Services.

Please note that payment is due upon receipt of the invoice. For your convenience, we accept checks, credit cards or automatic drafts. If you choose the credit card or automatic draft methods, then we will be happy to answer any questions about these methods of payment.

Additionally, we propose returning to evaluate the process and assess the operation and effectiveness of the system as well as make any recommendations for improvements at the 30 day and 90 day mark. Should you wish to engage us for those evaluations, there would be an additional fee of **\$5,000**.

Scope Changes

Because our Fixed Price Agreement **provides ongoing access** to the accounting and business advice on a fixed-price basis, you are not inhibited from seeking timely advice by the fear of a clock running endlessly. Our services are designed around fixed prices, as opposed to hourly rates, and offer you access to the accumulated wisdom of the firm through CPAs and others on our team with substantial experience.

While the fixed price entitles you to unlimited consultation with us related to the stated project(s), if your question or issue requires additional research and analysis beyond that, the work will be subject to an additional price negotiation **before** the service is to be performed, and a Change Order will be issued **before** delivery of the additional service and will include payment terms agreed to **in advance**.

Furthermore, the parties agree that if an unanticipated need arises (such as, but not limited to, an audit by a taxing agency, or any other service not anticipated in this agreement by the parties), McKey Business Group, CPAs hereby agrees to perform this additional work at a mutually agreed on price **before the service is provided**. This service will be billed separately, as part of a Change Order, and will be payable upon terms mutually agreed upon.

Agreement and Authorization

If you agree that the above adequately sets forth your understanding of our mutual responsibilities, please authorize this Agreement and return it to our office. A copy is provided for your records.

Agreed to and authorized:

By: _____

Renee Ellender Roberie

Louisiana Sales and Use Tax Commission for Remote Sellers

Date: _____

By: _____

Rebekah Summerville, CPA

Rebekah Summerville

McKey Business Group, CPAs

Date: 10/29/2020