Hummingbirds Financial Management & Business Advisory

General Engagement Terms and Conditions

Effective Date: [Current Version Date]

Thank you for considering Hummingbirds Financial Management & Business Advisory for your accounting, tax, payroll, financial management, and business advisory needs.

This document provides an overview of our standard terms and conditions and is intended for informational purposes only. A separate engagement agreement outlining the specific services, fees, responsibilities, and scope of work will be provided prior to the commencement of services.

Our Services

Depending upon the services selected, we may provide:

- Financial Management Services
- Accounting and Bookkeeping Services
- Payroll Administration
- Tax Preparation Services
- Tax Planning Services
- Financial Reporting
- Business Advisory Services
- Business Planning
- Startup Consulting
- Process Improvement Consulting
- Financial Systems Implementation
- Notary Services
- Other mutually agreed services

Services will be limited to those specifically included in your signed engagement agreement.

Client Responsibilities

To ensure timely and accurate service, clients agree to:

- Provide complete and accurate information.
- Submit requested records and documentation promptly.
- Review reports, returns, and deliverables provided.

- Notify us of any changes to business operations, ownership, financial activities, or tax matters.
- Maintain original records supporting transactions and tax filings.

Clients are responsible for the accuracy and completeness of all information provided.

Confidentiality

Hummingbirds Financial Management & Business Advisory maintains strict confidentiality regarding client information and will not disclose information except as permitted or required by law or authorized by the client.

Electronic Communications

Clients acknowledge that communication may occur through:

- Email
- Secure Portal
- Electronic Document Sharing
- Electronic Signature Platforms
- Virtual Meetings

While we take reasonable precautions to protect information, electronic communications carry inherent risks.

Fees and Billing

Fees vary depending on the scope of services provided.

Specific fee arrangements will be outlined in your engagement agreement and may include:

- Fixed monthly fees
- Project-based fees
- Hourly consulting fees
- Tax preparation fees
- Notary fees
- Other agreed-upon pricing arrangements

Invoices are due according to the payment terms outlined in the engagement agreement.

Limitation of Services

Unless specifically agreed upon in writing, our services do not include:

- Legal services
- Investment advice
- Financial auditing
- Valuation services
- Representation before regulatory agencies
- Assurance services
- Fraud investigations

Clients should consult appropriate legal, investment, insurance, or other professionals when necessary.

Document Retention

Clients should retain copies of all documents provided to us.

We maintain records in accordance with our document retention policies but are not responsible for maintaining original client records.

Limitation of Liability

To the fullest extent permitted by applicable law, Hummingbirds Financial Management & Business Advisory shall not be liable for damages resulting from incomplete, inaccurate, or untimely information provided by the client or for decisions made by the client based upon information provided through our services.

Termination of Services

Either party may terminate services upon written notice subject to the terms outlined in the signed engagement agreement.

Fees incurred through the date of termination remain the responsibility of the client.

Governing Law

This engagement shall be governed by the laws applicable in the state in which Hummingbirds Financial Management & Business Advisory maintains its principal place of business unless otherwise specified in the engagement agreement.

Important Notice

This document is provided for informational purposes only and does not constitute a contractual agreement. Services begin only after a separate engagement agreement is executed by both parties.