



CLIENT SERVICES AGREEMENT

This Agreement is dated as of _____ ("Effective Date") between **Shell Consulting Group, LLC** ("SCG"), a Florida Limited Liability Company, located at 3960 Radio Road, Suite 102, Naples, Florida 34104 and _____ ("Client"). Client and SCG are referred to herein from time to time individually as "Party" and collectively as "Parties".

SCG will work with Client to:

1. Identify qualified Coronavirus related sick and leave credits for self-employed business owners. ("S&L").
2. Calculate Coronavirus Related Tax Credits based upon data received and reviewed.
3. Prepare and deliver credit package to client with any applicable documentation for any Coronavirus Related Tax Credits that are available during the term of this Agreement.

TERM. This Agreement shall be for calculation and delivery of the Coronavirus Related Tax Credits and is in force for one year from the effective date or until all Coronavirus refunds are received, whichever is later.

TERMINATION. Either party may terminate this Agreement if the other party has materially breached the Agreement, provided that the party claiming breach must give the other party at least 30 days prior written notice to cure the breach before terminating this Agreement. The 30-day notice applies for all causes of breach except for breach due to the "Client Intent & Filing Process" section. Upon termination, Client shall be obligated to immediately pay all open invoices and all future invoices for work in process upon receipt of the invoice. This paragraph shall survive the termination of this agreement.

AUTHORITY. SCG does not provide tax advice, tax filings or CPA services. SCG is not a law firm. SCG is not a tax preparer and disclaims all responsibility for preparation of Client's federal and/or state tax returns. SCG will not render, or be required to render, any service that could be interpreted as the practice of accountancy. SCG will outsource the preparation of Form 1040x to an affiliated entity, Gulfcoast Bookkeeping LLC.

FEES. Client shall pay SCG a 25% contingency fee based on the actual tax credits identified related to the services above. Should the IRS withhold payments due to prior taxes owed by Client, that shall have no bearing on SCG's fee and client should continue to owe the full amount. Should Client fail to timely issue payment and require collections from SCG to obtain the agreed upon 25% contingency fee, Client shall be responsible for all fees and costs incurred in all collection attempts, including, but not limited to, pursuit demands, mediation, arbitration, and litigation.

Client will be invoiced when the tax credit package is delivered to the client, with the balance due upon receipt of processed tax credits.

+ 904-742-1699
+ 239-961-1115



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ACCESS. Client grants SCG reasonable limited access for the duration of the Agreement to perform the Services (the "Client Data"). All Client Data provided to SCG shall be deemed Confidential Information and accurate. SCG will rely solely on Client Data as we work through the eligibility and documentation process.

NOTICES. Any notice required or permitted under this Agreement will be deemed to have been given when personally delivered, delivered via e-mail, deposited with a nationally recognized courier, or sent by registered or certified US mail, return receipt requested, postage prepaid, to the other Party at the address set forth at the end of this Agreement.

MISCELLANEOUS. This Agreement shall be governed by the laws of the State of Florida. This Agreement and the rights of the parties hereunder shall be governed by and construed in accordance with the laws of the State of Florida including all matters of construction, validity, performance, and enforcement and without giving effect to the principles of conflict of laws. Any action brought by any party hereto shall be brought within the State of Florida, County of Collier.

IN WITNESS WHEREOF, the Parties have caused this Agreement to be executed as of the date first written above.

Shell Consulting Group, LLC

By: John Plocharczyk

By: (Client Signature)

Company Name	
Print Name	
Title	
Phone Number	
Email	
Address	





QUESTIONNAIRE

Question 1) Did you operate a trade or business in 2020 and/or 2021?

An individual regularly carries on a trade or business for purposes of being an eligible self-employed individual for the qualified sick leave equivalent credit and/or the qualified family leave equivalent credit if the individual carries on a trade or business within the meaning of section 1402 of the Code, or is a partner in a partnership carrying on a trade or business within the meaning of section 1402 of the Code. Section 1402(c) of the Code defines trade or business and includes exceptions to this standard for purposes of section 1402 of the Code.

Scenario A) For an eligible self-employed individual who is unable to work because the individual:

is subject to a Federal, State, or local quarantine or isolation order related to COVID-19; has been advised by a health care provider to self-quarantine due to concerns related to COVID-19; or is: experiencing symptoms of COVID-19 and seeking a medical diagnosis, seeking or awaiting the results of a diagnostic test for, or a medical diagnosis of, COVID-19 and the individual has been exposed to COVID-19 or is unable to work pending the results of the test or diagnosis, or obtaining immunization related to COVID-19 or recovering from any injury, disability, illness, or condition related to the immunization,

Scenario B) For an eligible self-employed individual who is unable to work because the individual:

is caring for an individual who is subject to a Federal, State, or local quarantine or isolation order related to COVID-19, or has been advised by a health care provider to self-quarantine due to concerns related to COVID-19; caring for a child if the child's school or place of care has been closed, or child care provider is unavailable due to COVID-19 precautions; or experiencing any other substantially similar condition specified by the Secretary of HHS in consultation with the Secretary of the Treasury and the Secretary of Labor. The Secretary of HHS has specified, after consultation with the Secretaries of Treasury and Labor, that a substantially similar condition is one in which the employee takes leave: to accompany an individual to obtain immunization related to COVID-19, or to care for an individual who is recovering from any injury, disability, illness, or condition related to the immunization.





QUESTIONNAIRE

Fiscal Year	Question	Yes	No	Schedule C Line 31 or Schedule SE Line 2
2019	Did you operate a trade or business?			
2020	Did you operate a trade or business?			
2021	Did you operate a trade or business?			

Time Period	Scenario A Applies	Scenario B Applies	Amount of Days
March 13 - December 31 2020			
January 1 - March 31 2021			
April 1 - June 30 2021			
July 1 - September 30 2021			

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CALENDAR

We need to know the exact dates Scenario A applies:

March 2020	
April 2020	
May 2020	
June 2020	
July 2020	
August 2020	
September 2020	
October 2020	
November 2020	
December 2020	

January 2021	
February 2021	
March 2021	
April 2021	
May 2021	
June 2021	
July 2021	
August 2021	
September 2021	





CALENDAR

We need to know the exact dates Scenario B applies:

March 2020	
April 2020	
May 2020	
June 2020	
July 2020	
August 2020	
September 2020	
October 2020	
November 2020	
December 2020	

January 2021	
February 2021	
March 2021	
April 2021	
May 2021	
June 2021	
July 2021	
August 2021	
September 2021	





DOCUMENTS NEEDED

Document Description	Checklist
Void check to confirm banking details for refund	
Copy of Drivers License to verify identity	
2019 Form 1040	
2020 Form 1040	
2021 Form 1040	

Secure Upload
click below



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