



Client Name: _____

Tax Year(s): _____

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Office@bkptax.com

2024 Agreement to Provide Tax Services

This engagement letter expresses the terms and conditions under which we will provide you with tax services. We will prepare your individual tax returns using information you supply and apply the tax law to the best of our ability. It is not our responsibility to verify your deductions, exemptions or to audit your tax return. Should you be audited, the tax agency will require you to support your deductions.

Reminders

We have a new ShareFile “client portal” account and your old login will not work. E-mail office@bkptax.com if you need a new invite.

Please keep in mind that our office assistant, TJ, is not a licensed tax preparer and cannot discuss tax information with you or answer any questions related to personal income taxes or tax returns (other than questions needed to schedule an appointment, or verifying factual information such as a return was filed or that a specific document from the client was received, etc.).

Businesses-we cannot estimate income, expenses, mileage, or use “the same numbers” as last year. You are required to report accurate information that can be backed up with documentation should the IRS or State request it.

Tax Preparation Process

- Review and sign our engagement letter, privacy policy and fill out the tax questionnaire. These are available for download on our website www.bkptax.com and in our office.
- Drop off or upload these three forms along with your tax documents.
- If you use the portal, you must notify us when you are done uploading your documents. Tax prep will not start until you upload this letter, privacy policy and questionnaire.
- You will be notified when your tax return is completed and ready for your review. Please review your taxes carefully. If you missed providing any information and an amendment is necessary, the fee for an amendment starts at \$100. If there is an error on our part, there will be no charge for the amendment.
- We cannot file a tax return unless we have the taxpayer signature authorization on form 8879 (the “e-file sheet”). In the case of a joint return, we will need both taxpayer signatures.
- Tax preparation fees and any related charges are due when your return is complete and approved by you.

Taxes Owed: The United States income tax system is a pay-as-you-go tax system, which means that you must pay income tax as you earn or receive your income during the year. An extension to file taxes does not give you an extension to pay and you will incur interest and penalties for any payments made after the April deadline. If you file an extension and think you might owe, you need to send in a payment at that time.

Record Retention Policy: In accordance with our firm’s current record retention policy, we will retain our work papers and copies of your financial reports and other records for four years after the date of preparation. We will return all of your original documents. It is agreed and understood that in connection with the performance of our engagement, the work papers prepared by us will remain our property.

Liability: As additional consideration for me to provide you with these services, you agree that the extent of our liability for damages to you for any actions taken will not exceed the total amount actually paid by you for our services. You agree that this will be your only remedy and you hereby waive any other claims you have now or in the future for actual, incidental, and consequential damages, including, but not limited to, lost profits and third-party claims.

Both of us may cancel this engagement at any time. If you cancel and we have performed any work prior to our receiving your cancellation notice, you agree to pay me for such work performed based upon our current rate schedule. We may use any deposits or payments already received and apply them to your account.

The engagement terms described in this letter are acceptable and hereby are agreed to.

Taxpayer Signature: _____

Date: _____

Spouse Signature: _____

Date: _____