



# MIDWEST BUSINESS & ACCOUNTING SERVICES

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January 7, 2021

Engagement Letter for Individual Income Tax Services,

To minimize the possibility of a misunderstanding between us, we are setting forth pertinent information about the services we will perform for you.

We will prepare your 2021 Federal and requested state income tax returns from information which you will furnish to us. We will not audit or otherwise verify the data you submit, although we may ask you to clarify some of it or furnish us with additional data.

If you request, we will also prepare your estimated tax vouchers for 2021. Please advise us if you anticipate substantially lower income for 2022, a change in withholding taxes, or a significant increase in your 2021 income. Should this occur later in the year, please advise us at that time.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. We will provide you with questionnaires and an organizer to guide you in gathering the information. You represent that the information you are supplying to us is accurate and complete, to the best of your knowledge, and that your expenses for meals, entertainment, travel, gifts, charitable contributions, and vehicle use are supported by records as required by law. You should retain all the documents, cancelled checks, and other data that form the basis of your income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign and file them.

Your returns may be selected for review by taxing authorities. Any proposed adjustments are subject to certain rights of appeal. In the event of a tax examination, we will be glad to assist or represent you, at your request. We will render additional invoices for the time and expenses incurred.

Our fees for preparation of your returns are based upon our billing rates for the complexity of the return plus out of pocket expenses. In addition, this fee depends upon the timely delivery, availability, quality, and completeness of the information you provide to us. You agree that you will deliver all records requested and respond to all inquiries made by our staff to complete this engagement on a timely basis. We require that all outstanding invoices be paid prior to releasing the completed tax returns. We do not release incomplete tax returns.

We appreciate the opportunity to be of service to you and believe this letter accurately summarizes the significant terms of our engagement. If you have any questions, please let us know. If you agree with the terms of engagement as described in this letter, please sign in the space indicated below and return it to us. This letter will continue in effect until canceled by either party.

Sincerely,  
Courtney Howe  
Midwest Business & Accounting Services

**ACKNOWLEDGEMENT:**

This letter correctly sets forth our understanding.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Printed: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Printed: \_\_\_\_\_