



January 2024

Dear Client,

I appreciate the opportunity of serving you and advising you on your income tax needs.

To ensure a complete understanding between us, Tax Worx LLC ("The Firm"), this letter is to confirm our understanding of the terms of our agreement, and outline the nature and extent of services we will provide. Based upon the information you furnish to us, we will prepare your Federal and applicable state income tax returns for 2023.

**We will not audit or verify the data you submit to us.** It is your responsibility to provide all the information required to prepare complete and accurate returns. You represent that there is adequate substantiation to support deductions for any expenses claimed on the return. **You are ultimately responsible for the accuracy of your return and should review it carefully before signing-off and we e-file your return.**

\_\_\_\_\_ In order to timely file your tax return, we need all required information **no later than 20 days prior to the tax filing deadline (March 25, 2024** is 20 days prior to Tax Day, Monday, April 15, 2024). To encourage a timely and accurate filing, tax documents received **less than 20 days prior** to tax filing day may require you to request an extension and may result in additional fees.

**We will also prepare 2023 estimated tax vouchers if required,** based on your income and withholding taxes for 2023. If you anticipate a substantial change in income or withholding taxes for 2023, please advise us as soon as possible. We will then determine whether an adjustment should be made to your tax estimates.

#### **Documents**

You should retain all the documents, receipts, mileage logs, canceled checks, and other data which form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. Your returns are subject to review by the taxing authorities. Any items that may be resolved against you by the examining agent are subject to certain rights of appeal. In the event of an examination, we will make arrangements upon request to represent you, or to review the results of any examination. **Billing for these additional services will be determined upon the complexity of the case,** and a retainer will be required.

\* \_\_\_\_\_ Digital documents will only be accepted in the form of a pdf, Word, Excel, or similar format. Otherwise, hard copy documents are accepted.

\* \_\_\_\_\_jpg and photo files of documents will not be accepted.

---

### **RICK REICHERT**

125 ROCKLAND AVENUE, STRATFORD, CT 06614

O: (203) 429-4584

[rick@tax-worx.com](mailto:rick@tax-worx.com)

tax-worx.com

*PERSONAL FINANCE, TAX, PHILANTHROPY, NOTARY*



\* \_\_\_\_\_ Digital documents will only be accepted if uploaded onto our shared folders (such as Dropbox or OneDrive), and clearly identified (i.e., "Jones W2 Shoprite").

\* \_\_\_\_\_ For security purposes, the protection of your sensitive materials and those of all of our clients, documents received by text or email will be deleted upon receipt.

\* \_\_\_\_\_ Correspondence by text will be accepted only to confirm an appointment, receipt of a document, or similar communication. All other communication is to be by phone or email.

\* **Please initial.**

**Consulting:**

My services come in the form of a tax return plus consultations, meetings or phone calls. Fees are based upon several factors.

I have spent years becoming knowledgeable and educated in tax matters. When you contact me, it is because you rely upon my knowledge and assistance with something, and this is when my time *may* become billable. If you call with a "general" question that can be quickly answered, this will be considered a courtesy service and you will not be billed for our time. Phone calls requiring research, business or personal planning, tax compliance, etc., will be billed in accordance with our billing policy.

**The charges for our services are based on our fee schedule and the complexity of the returns.**

Additional services, such as reviewing documents or applications, and guidance on tax and financial matters, will be subject to additional charges, at our discretion.

**Payment:** An e-file authorization signature and **payment in full is required before any tax return can be electronically filed or released.** You will receive a full paper or pdf of your return. I reserve the right to hold the completed returns until your account is paid in full.

**Errors:** If there is an error on the return resulting from incorrect information supplied by you, or due to your subsequent receipt of amended or corrected tax forms (W-2s, 1099s, K-1s), you are responsible for the payment of any additional taxes which would have been properly due on the original return(s), along with any interest and penalties charged by the IRS. Should there be an error or omission on the part of The Firm, any resulting penalties and interest will be covered by us. **Please note that you are responsible for any taxes owed.**

Either party may terminate this agreement upon giving a ten (10) days written notice (including by email). Should this agreement be terminated prior to completion of services, we will prepare a final bill showing the total fees incurred for services rendered. This amount will be due and payable upon receipt.

Please be advised that certain communications involving tax advice between you and The Firm may be privileged and not subject to disclosure to the IRS. If you disclose the contents of those communications to anyone, or turn over information about those communications to the government, you may be waiving this privilege. To protect your rights, please consult with us or your attorney prior to disclosing any information about our tax advice.

