ENGAGEMENT LETTER FOR INDIVIDUAL TAX RETURN PREPARATION

Thank you for choosing Tasha's Total Tax Service to provide you with tax preparation services. This engagement letter is to inform you of the services Nathasha Banks owner of Tasha's Taxes will provide in relation to tax return preparation, what responsibilities you have, and what my responsibilities are.

Tax Preparation:

- ➤ I will prepare your federal return with supporting schedules for the applicable tax year based on the information you provide.
- It is your responsibility to provide information required for preparation of complete and accurate returns. Original records will be returned upon completion of the tax return(s), however, it is recommended that you provide photocopies to prevent data loss. I am not responsible for lost, damaged, or stolen records.
- It is your responsibility to provide all requested information and documentation in a timely manner to ensure returns are complete by their due date. Although I will endeavor to extend the due date of your tax return(s) if they are not completed by the filing deadline, ultimately you may be subject to late filing penalties because of the delay.
- I will not audit or otherwise verify your records to discover errors or omissions, should any exist. However, if I find irregularities or unusual items, I will bring them to your attention and/or ask for clarification.
- The only bookkeeping or analysis work I will do is that which is necessary for preparation of your income tax returns. More extensive Bookkeeping services including issuing 1099's and/or W2's is available at an additional charge and will require a separate engagement letter.
- You attest that the information you provide is accurate and complete to the best of your knowledge and that you can produce receipts, proper records, checks and bank statements necessary to substantiate all expenses and income in the event of an audit.
- You are ultimately responsible for the accuracy of the tax return(s) and should review all documents carefully before signing.

Fees and Payment

- > All preparation fees are invoiced per tax return per tax year
- My fees are based on the complexity of your tax return and the forms or schedules necessary to complete the return as well as any out-of-pocket expense.
- Tax preparation fees must be paid, or suitable arrangements made, prior to the return being electronically filed or released to you.
- ➤ I reserve the right to ask for a retainer to be paid in advance of work done from new clients and any client with whom I have experienced payment problems.
- If you terminate this engagement before completion of your tax return, you agree to pay for time and expenses incurred prior to the date of termination, even if the tax return(s) are not completed.
- > Payment options are available. See the attached list.

Important Notices

- ➤ Where tax law is ambiguous or unclear, I will use my best judgement in resolving questions or issues. Where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions, I will apply the "more likely than not" reliance standard to resolve such issues. You agree to honor my decisions regarding the need to make protective disclosures in your returns.
- Penalties can be imposed when taxpayers understate their tax liability. If you would like information on these penalties, please contact me.
- If an extension of time is required, any estimated taxes owed must be paid when the extension is filed. Any amounts not paid by the filing deadline are subject to interest and late payment penalties.
- The IRS does not permit me to discuss your tax return with them unless authorized by the client by checking a specific box on your tax return. Unless otherwise instructed by you, I will check the box which authorizes the IRS to discuss your tax return with me.
- Your tax return(s) may be selected for audit by tax authorities. Any proposed adjustments are subject to appeal. In the event of a tax examination, I can arrange to be available to represent you. Such representation will be a separate engagement for which an engagement letter will be provided to you. Fees and expenses for defending the returns will be invoiced in accordance with terms we agree on for that engagement.
- > One printed or digital copy of your tax return(s) will be provided to you for your files.

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This engagement letter will remain in effect for three years from the date signed unless terminated or amended in writing by you or by Nathasha Banks. By signing below, you agree that you have read, understand and accept your obligations as well as my responsibilities.

Thank you. I appreciate your confidence.

Tax Preparer		Date	
Taxpayer Signature	Date	Spouse Signature	Date

Privacy Policy - Your Information is Confidential

Protecting the confidentiality and security of current and former Clients' information is of utmost importance. I do not share or disclose any confidential business or confidential tax return information obtained in the course of my practice with any third-party without your explicit written authorization, or as required by law.

Records relating to professional and tax services provided by Tasha's Total Tax service, LLC and are retained according to Federal and State laws. In order to guard your nonpublic personal information, I maintain physical, electronic, and procedural safeguards.

I collect nonpublic personal information about you that is provided to me by you or obtained by me with your authorization.