

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.

