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Engagement Letter

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements.

We will prepare your federal and state income tax returns from information which you will furnish to us. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for the clarification of some of the information. We will furnish you with questionnaires and worksheets to guide you in gathering the necessary information. Your use of such forms will assist in keeping the fee to a minimum.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, cancelled checks and other data that form the basis of 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 them.

Our fee for the preparation of your returns will be based upon a combination of charges for time spent, and charges for forms required. All invoices are due and payable upon presentation. Tax returns cannot be filed electronically until our fee is paid in full. Payments for our fee can be in the form of cash, check or credit card (MC or VISA).

Your returns may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred.

If the foregoing fairly sets forth your understanding, please sign this letter and bring it in with you to your appointment, or include it if you mail in your papers.

Accepted By: _____

Printed Name: _____

Date: _____

Contact Information

Name(s): _____

Email(s): _____

Address: _____

City, State, Zip: _____

Home Phone: _____

Cell Phone: _____

Other Phone: _____

I elect to have my Tax Returns delivered to me electronically (password protected PDF)