

RELIABLE TAX SERVICE
P. O. BOX 30369
MESA, ARIZONA 85275-0369
PH. 480-828-0881/480-981-3005
E-MAIL IS: jim@reliabletaxaz.com

Re: 2023 Letter of Engagement for personal tax returns

Client names (Please print):

Thank you for placing your confidence in our services for the preparation of your income tax return. This agreement confirms the terms of such engagement with you and the nature and extent of the services we'll provide.

We will prepare your 2023 Federal and State personal income tax returns using the information you provide to us. We've sent you a tax organizer to help gather the necessary information for us which will help keep the fee lower. We remind you that YOU are to have all books, records, cancelled checks, vehicle or gambling logbooks, substantiation documents, etc., readily available, to validate any, and all, information entered on your tax return. By signing this Letter of Engagement, you certify that you do, indeed, have any, and all, of the substantiation documents to prove all income, expenses, credits, dependents claimed, etc., found on your return. Our fee for this service is \$185 for the 1040 form series (including 1040X), plus \$50 for most required pages thereafter for either the IRS or any State filing needed. There are four forms that are \$75 each, which are Schedules C, E and F, and form 4835. No charge for one state return when hiring us to prepare your federal return. Additional states that you need filing for will be billed at \$150 each. You'll be billed additionally at the rate of \$150 per hour if your substantiation receipts are not totaled up and we need to total them for you. If we need to fax or mail your return to you, we'll bill you for

those charges in addition to the tax preparation fee. We are not auditing nor certifying any of your records or statements for accuracy; we're using your data to prepare your tax returns, only. You'll receive one copy of your Federal and State returns included with your tax preparation fee. If you need additional copies of your returns, there'll be a minimum charge of \$25 per tax year requested, plus postage or fax charges, if applicable. Late fees of 2% per month and other charges will apply if returns are not paid for within 30 days of completion. Fees are due upon completion. We'll keep copies of your tax returns for up to 4 years from the due date of the return, but you'll need to keep copies of your returns and the substantiation documents for as long as the IRS or state deems them necessary. This is generally 7 years. If you receive any correspondence from the IRS or any state taxing authority, you agree to forward either the original or a copy of said notice to us immediately upon receipt. If we've made an error on your return and it needs to be amended, we'll cover the cost of any additional penalties or interest caused by our error. However, if you've made an error or failed to provide information pertinent to the return, we'll charge additional fees to amend your returns. If you get audited, that'll be a separate engagement and separate fee. Virtual office visits outside the scope of this engagement letter, including tax planning and forecasting, are billed at \$150 per hour and are a separate engagement from this one.

Sincerely,

James D. Fox, MBA, EA

Accepted by taxpayer(s):

Note: Both spouses need to sign this form for a jointly filed tax return