

RELIABLE TAX SERVICE

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RE: Entity Letter of Engagement for 2024 entity income tax returns

LEGAL BUSINESS NAME:

Please print

DBA NAME, IF APPLICABLE:

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 2024 Federal and State personal income tax returns using the information you provide to us. We've sent you a list of questions/ requests to help gather the necessary information for us which will help keep our fees lower. We remind you that YOU are to have all books, records, canceled checks, bank statements, vehicle records and 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, and credits that will appear on your tax returns.

Fees:

Our fees for preparing your income tax returns begin at \$475 for the entity returns 1120, 1120-S, 1065, and 1041 and could be a little higher depending on additional complexity due to unforeseen circumstances, if we need to sort thru receipts, or need to prepare additional out-of-state tax returns. One state return is included in this price. Any additional state returns will be \$250 each. Office time to sort through receipts is \$150 per hour. Any additional costs, such as faxing, postage and mailing, duplication, etc., will be billed in addition to the return fees.

When we've completed preparing your returns, you'll be given a copy of those returns either by paper copy or electronically posted PDF file to your Link account. If you need replacement copies of your returns, those are \$35 each, plus postage, per tax year requested. However, if you have a Link account established, there is no fee as you'll have a PDF copy available to you 24/7. 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,

Jim Fox, MBA, EA ACCEPTED BY:

TAXPAYER _____ Title _____

SPOUSE _____ Title _____