Dear client: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Thank you for choosing at **D5 Tax Services, LLC** to assist you with amending your tax **(2020).** This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will amend your **(2020)** federal and state personal or business income tax returns, and prepare your **(2020)** tax return. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. We will also provide **(Enter Time Here In Hours)** of representation work, which consist of communicating with the IRS and writing correspondence on your behalf.

Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will, of course, inform you of any material errors, fraud, or other illegal acts we discover.

The law imposes penalties when taxpayers underestimate their tax liability. Please call us if you have concerns about such penalties.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

Our fee will be **($125.00)** for amending your **(2020)** federal and state tax return and **($375.00)** for the preparation of your **(2020)** tax return this fee is based on the time, the forms necessary and complexity of your return. Invoices are due and payable upon presentation. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (**30**) days.

We will return your original records to you at the end of this engagement. You should securely store these records, along with all supporting documents, canceled checks, etc., as these items may later be needed to prove accuracy and completeness of a return. We will retain copies of your records and our work papers for your engagement for three years, after which these documents will be destroyed.

Our engagement to amend your **(2020) t**ax return and prepare your **(2020)** tax returns will conclude with the delivery of the completed returns to you (if paper-filing), or your signature and our subsequent submittal of your tax return (if e-filing). If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them.

**($125.00)** is due to begin the services and the balance of **(0)** before the returns are sent to the IRS and or state. There is a credit card authorization form for you to fill out to let us know when you would like to make the other payments with a minimal payment of **(Enter minimal amount),** this way we could pull the funds from your account.

This engagement include **(Enter number of hours)** hours tax representation, which includes but not limited to state/federal audits, liens, levies, garnishments or correspondence ect. If your case extends **(Enter Number of Hours)** hours of representation work there will be a billed fee of **(Enter Hourly Cost)** per hour

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign this letter in the space indicated and submit via the portal.

We appreciate your confidence in us. Please call or email if you have any questions or concerns.

Sincerely,

**CATONYA SCOTT**

(Both spouses must sign for the preparation of joint return)

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Taxpayer

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Spouse

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Date