

Brad DeWeese CPA PA
PO Box 11938, Charlotte, NC 28220
Phone (980) 237-9047

General Engagement Letter for Individual Tax Return Preparation

Dear Client:

Thank you for choosing Brad DeWeese CPA PA to assist you with your 2024 taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your 2024 federal and state income tax returns. We will depend on you to provide the information we need to prepare complete and accurate returns. An Organizer will be provided to help you collect the data required for your return. The Organizer if completed may help you avoid overlooking important information.

Taxpayer agrees that Brad DeWeese CPA PA is a paid preparer only and claims no responsibility for the accuracy or completeness of the information provided to Brad DeWeese CPA PA. Brad DeWeese CPA PA is under no duty to inspect, audit, or otherwise make assertions as to the accuracy or completeness of the information provided by taxpayer. We will correct any mistake made by us in the preparation of your tax return at no charge to you. Should a correction result in additional amounts due, we will not pay penalties, additional taxes, or interest due.

Brad DeWeese CPA PA will perform services only as needed to prepare the tax returns. Our work does 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. The law imposes penalties when taxpayers underestimate their tax liability. Call us if you have concerns about such penalties.

Tax law can be unclear and there may be potential conflicts in the interpretation of the law. Taxpayer acknowledges that Brad DeWeese CPA PA will adopt, on behalf of taxpayer, the alternative selected by taxpayer if we discover and encounter instances of unclear tax law or potential conflicts in the interpretation of the law. Taxpayer has the final responsibility of the tax return, and it should be reviewed by the taxpayer prior to signature and submission to the tax authority.

Our fee is based on time and out-of-pocket expenses. Invoices will be sent upon completion of your returns with a due date. Invoices not paid within thirty (30) days of due date are subject to 2.0% of interest per month.

We will return your original records to you by mail at the end of this engagement if you do not pick up documents. Store these records, along with all supporting documents, in a secure location. We retain copies of your records for up to five years, after which these documents may be destroyed.

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. Our engagement to prepare your 2024 tax returns will conclude with the delivery of the completed returns to you, or with e-filed returns, with your signature and our subsequent submittal of your tax return.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, sign this letter in the space indicated. Thank you for the opportunity to be of service. If you have any questions, contact our office.

Taxpayer Signature: _____ Date: _____

Spouse Signature: _____ Date: _____

Privacy Policy

Your privacy is important to us. Read the following privacy policy.

We collect nonpublic personal information about you from various sources, including:

- * Interviews regarding your tax situation
- * Applications, organizers, or other documents that supply such information as your name, address, telephone number, Social Security Number, number of dependents, income, and other tax-related data
- * Tax-related documents you provide that are required for processing tax returns, such as Forms W-2, 1099R, 1099-INT and 1099-DIV, and stock transactions

We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as requested by our clients or as required by law.

We restrict access to personal information concerning you, except to our employees who need such information in order to provide products or services to you. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your personal information.

If you have any questions about our privacy policy, contact our office at 980-237-9047.