

Cedar Accounting Inc.

This letter describes our expectations of you and what you should expect from us. Please read it and be sure to ask any questions before we begin.

I understand and consent to the following authorizations:

PRIVACY POLICY: *It is the policy of Cedar Accounting Inc. to treat your information with the utmost confidentiality and care. Your personal information will only be shared with members of our firm or tax colleagues who need to know this information in order to complete the work you have hired our firm to do. We will not disclose your personal and confidential information to anyone outside our firm without your express written permission or unless we are legally required to do so. We maintain physical, electronic and procedural safeguards to protect your information. By signing below you assert you have reviewed our Privacy document. Initial: _____*

SERVICES TO BE PROVIDED AND FEES CHARGED: *We will prepare your current, amended or prior year Federal & State income returns from the information that you furnish to us. We will not audit the data you provide. However, we may ask you to clarify some of the information. It is your responsibility to provide all the information necessary to complete your tax return and to maintain, in your records, the documentation (e.g. receipts, cancelled checks, calendars, and mileage logs) necessary to support the items of income and deductible expenses claimed on your tax returns. These may be necessary to prove the accuracy and completeness of the returns to the taxing authority. If your information is not complete at our meeting, you agree to submit all requested information within one week. Since you have final responsibility for the information on your tax returns, we highly recommend that you review the tax returns carefully before signing and filing them. If you have questions as to the records required, please ask us for advice in that regard. Initial: _____*

FINANCIAL PLANNING DISCLOSURE AUTHORIZATION – IRC7216: *We also offer planning for tax and investments, Social Security, VA benefits, retirement, special needs, legacy and comprehensive financial planning. Although we may answer questions that you raise in general terms during preparation of your tax return, the limited time available does not permit us to consider the entirety of your situation. As a result, this does not constitute and should not be considered, financial planning. Initial: _____*

FILING OF RETURN AND PAYMENT OF FEES: *All returns eligible for electronic filing (e-file) will be filed electronically unless you notify us in writing that you wish to file on paper. We will provide you with a paper copy of any return filed electronically and a duplicate copy of any return we prepare for you to file on paper. All original documents which you provide to us for use in the preparation of your return will be returned to you with your tax returns for the year. We may make copies for our own records. We will retain an electronic copy of any return filed on your behalf at least as long as required by the IRS. Our professional fee for tax services is based on the complexity of the return, as determined by the number and type of forms required. An itemized statement is provided upon request. Our full list of fees is available for your review in office. We will be happy to provide a good faith estimate of the fee for preparation of your return; however, any inadvertent omissions by you will affect the accuracy of any such estimate. If Cedar Accounting Inc. begins preparing or completing your return and you then terminate the engagement, you will be invoiced and charged for the work completed to that point based on our current pricing sheet. Our professional fee is due on completion of the return and must be paid prior to the release or filing of your tax return. Balances remaining outstanding 20 days after completion of the return are subject to a service charge of 18% annually, compounded monthly. Initial: _____*

REVISION OF RETURNS: *Should a tax return require revision after completion through no fault of Cedar Accounting Inc., revision fees will apply as indicated in our pricing sheet. Any tax return requiring revision due to a legitimate preparation error will be revised at no charge. Initial: _____*

EXAMINATION OF RETURNS: *Your return may be selected for examination or review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event that such government tax examination, we will be available upon request to assist you. If an examination occurs, we will represent you if you so desire; however, these additional services are not included in our fee for preparation of your returns and we will render additional invoices for the time and expenses incurred. Please fax any notice/letter you receive to us at 904-508-0236.*

Initial: _____

IRS E-FILE SIGNATURE AUTHORIZATION: *With your permission, we can “sign” your electronically filed Federal tax returns with a Personal Identification Number (PIN). You will need to sign the IRS E-File Signature Authorization Forms for both the IRS and any State that may require their own separate form. Both taxpayers must sign this form before we are permitted to e-file your returns. The IRS Form 8879 may be faxed or emailed to our office once signed. Our fax is 904-508-0236 or email to info@cedaraccountinginc.com. Initial: _____*

FILING DEADLINES AND EXTENSIONS: *The filing deadline for Federal returns is April 15th (or the next business day when April 15th falls on a weekend/holiday). In order to meet this filing deadline, the information needed to complete the return should be received by our office no later than March 15th. Additionally, tax organizers and information received after April 1st must include a copy of the signed extension (IRS Form 4868) filed with the IRS for the current tax year as applicable. You may also stop into our office and sign an E-file Extension Form and have us e-file your extension for an additional fee. We will make a good faith effort to file complete tax returns prior to the April 15th deadline. Initial: _____*

ADDITIONAL COPIES FOR CLIENT OR 3RD PARTY: *One (1) copy of your return will be provided to you for your files. Additional copies at the time of preparation are \$10.00 each. Copies at any other time are \$25.00 each. Due to privacy laws we will release copies only to you, you can at your discretion share with Third Party Vendors.*

Initial: _____

GUARANTEE: *Despite our best efforts, we do occasionally make mistakes. Please let us know immediately if you receive any letters or phone calls from the government. We are open year – round. We will correct the returns for free, and pay any penalties if we are at fault. However, we are not responsible for paying any additional taxes or interest which might be owed or penalties which accrue after the IRS or state tax authority first contacts you. You agree that Cedar Accounting Inc.’s liability hereunder for damages shall not exceed the total amount paid for the services described herein. This shall be your exclusive remedy.*

ACKNOWLEDGEMENT AND CONSENT:

Taxpayer (printed)	Taxpayer (signed)	Date
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Spouse (printed)	Spouse (signed)	Date
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