



General Engagement Letter for Individual Tax Return Preparation

This Letter is to inform you, the taxpayer, of the services we will provide you, and the responsibilities you have for preparation of your return.

Tax Return Preparation

- We will prepare your 2024 Form 1040, U.S. Individual Income Tax Return, and state tax return based on information you provide. Services for preparation of your return do not include auditing or verification of information provided by you.
- This engagement does not include any audit or examination of your books or records. In the event your return is audited, you will be responsible for verifying the items reported.
- The tax return preparation fee does not include bookkeeping. Additional fees apply for these services.
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
- Preparation fees do cover limited assistance and consultation during the year.
- The engagement to prepare your 2024 tax returns terminates upon delivery of your completed returns and original documents to you. Please store your supporting documents and copies of your tax returns in a secure place for at least seven years. You may be assessed a fee if you request a copy in the future.

Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the return carefully before signing to make sure the information is correct.
- **Fees are due at the start of your preparation, unpaid invoice will delayed the start of your tax return filing.**

Signatures. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities and that you underrepresent our responsibilities in preparing your tax returns as explained above. For a joint return, both taxpayers must sign.

Taxpayer

Spouse

Date

Privacy Policy. The nature of our work requires us to collect certain nonpublic personal information about you from various sources. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our



Experience you can Trust.

clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to any third party without your express permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access. Please contact us with any questions regarding our privacy policy.

CLIENT SERVICE AGREEMENT

Welcome to Value Tax Prep

Thank you for choosing VALUE TAX PREP. This Client Service Agreement (“CSA”) explains what you should expect from your associate and the company in general. This CSA also explains what is required from you, so that we may provide the professional service(s) you expect.

VALUE TAX PREP will prepare your tax return(s) as well as provide any other advice and/or services you request. Your associate will (1) interview you to learn the details that affect your taxes and/or business situation(s), and (2) ask you to provide documents, such as W-2 statements(s) or other documents which accurately record your income, credits and/or deductions. You agree to timely provide the requested and/or required documentation as well as verify the accuracy and integrity of such documents. If you discover you have not provided accurate or complete information and/or documentation, you agree to amend any tax returns or prepared financial statements. There may be an additional fee for preparation of amended forms and files.

VALUE TAX PREP will provide technology services pursuant to this CSA in order to facilitate e-filing, tax preparation and business services on your behalf. VALUE TAX PREP owns all right and title to its facilitation services including, but not limited to, all methods, processes, content formats, designs. Any facilitation services performed by VALUE TAX PREP are deemed as having been performed in the State of Florida.

VALUE TAX PREP does not offer Refund Anticipation Products (RAP) and fees must be paid when services are rendered.

Arbitration if a Dispute Arises (“Arbitration Agreement”)

I. SCOPE OF ARBITRATION AGREEMENT. All disputes and claims between you and any one or more VALUE TAX PREP parties shall be resolved through binding individual arbitration. However, either you or a VALUE TAX PREP party may bring any individual claim in small claims court, as long as it is brought and maintained as an individual claim. All issues are for the arbitrator to decide.

II. HOW ARBITRATION WORKS. Either party may initiate arbitration, which shall be conducted by the American Arbitration Association (“AAA”) pursuant to its Commercial Arbitration Rules and Supplemental Procedures for Consumer-Related Disputes (“AAA Rules”). The AAA rules are available for inspection on the AAA’s website www.adr.org or by calling the AAA at 1-800-778-7879. In the event the AAA is unavailable, the parties shall agree to, or the court shall select, another arbitration provider. Unless you and the VALUE TAX PREP parties agree otherwise, any arbitration hearing shall take place in the County of your Residence.

III. WAIVER OF RIGHT TO BRING CLASS ACTION & REPRESENTATIVE CLAIMS. All arbitrations shall proceed on an individual basis. The arbitrator is empowered to resolve the dispute with the same remedies available in court, including compensatory, statutory, and punitive damages; attorney’s fees and declaratory, injunctive or equitable relief. Relief must be individualized to you and shall not affect any other client of VALUE TAX PREP. The arbitrator is also empowered to resolve the dispute with the same defenses available in court, including but not limited to statutes of limitation. YOU AND THE VALUE TAX PREP PARTIES HEREBY AGREE TO WAIVE THE RIGHT TO TRIAL BY JURY, TO ASSERT OR PARTICIPATE IN A CLASS-ACTION LAWSUIT/ARBITRATION, TO ASSERT OR PARTICIPATE IN A PRIVATE ATTORNEY GENERAL LAWSUIT/ARBITRATION, OR TO ASSERT OR PARTICIPATE IN ANY JOINT OR CONSOLIDATED LAWSUIT/ARBITRATION OF ANY KIND. If a court decides that applicable law enforcement precludes any of this paragraph’s limitations as to a particular cause of action, then that cause of action (and only that cause of action) must remain in court and severed from arbitration.

IV. ARBITRATION COSTS. The VALUE TAX PREP parties will pay all filing, administrative and hearing costs. The VALUE TAX PREP parties waive the right to recover an award of attorney’s fees and expenses against you.

V. OTHER TERMS & INFORMATION. This Arbitration Agreement shall be governed by, and interpreted, construed, and enforced in accordance with, the Federal Arbitration Act and other applicable federal law. To the extent any state law applies to any aspect of this CSA, or to any disputes and claims that are covered by the Arbitration Agreement, the law of the state in which this CSA is signed will govern. Except as set forth above, if any portion of this Arbitration Agreement is deemed invalid or unenforceable, it will not invalidate the remaining portions of the Arbitration Agreement.

THIS CONTRACT CONTAINS A BINDING ARBITRATION PROVISION

I/We understand and voluntarily agree to the terms of the Arbitration Agreement described above, as well as the other terms, conditions and disclosures presented in this Client Service Agreement.

Client Signature

Date

Spouse Signature – Required if MFJ

Date

P.O Box 889
Brandon FL 33511
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