

Tax Preparation Service Agreement and Engagement Letter

Revised 2/2/2021



Thank you for considering us for your tax preparation services.

This letter is to inform you, the tax preparation client(s), of the services your tax professional will provide you and the responsibilities you have for preparation of your tax return.

Tax Return Preparation

1. Your tax professional is an independent tax professional. Tax professionals working from this office operate on his/her own price schedule and keeps his/her own records.
2. Your tax professional will prepare your federal and state tax returns based on information you (and your spouse, if filing jointly) provide. Services for preparation of your return do not include auditing or verification of information provided by you (and your spouse, if filing jointly).
3. This engagement does not include any audit or examination of your books or records. In the event your return is audited, you (and your spouse, if filing jointly) will be responsible for verifying the items reported. Audit assistance is available (for an additional fee) through a third-party service.
4. The tax return preparation fee does not include bookkeeping.
5. Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
6. Preparation fees do cover limited assistance.
7. The engagement to prepare your tax return(s) terminates upon delivery of your completed return(s). Please store your supporting documents and copies of your tax returns in a secure place.
8. Our office is typically open mid-January to the end of April, Monday – Saturday with some Sundays during “peak time.” After tax season, we are available via appointment only on a very limited basis.

Client (Taxpayer) Responsibilities

1. You (and your spouse, if filing jointly) agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you (or your spouse) will contact us immediately to ensure your completed tax returns contain all relevant information. If your tax return has already been completed and printed but not filed, you (or your spouse, if filing jointly) agree to pay an additional \$25-50 to make the necessary changes.
2. If we have to amend your return, for whatever reason, you (and your spouse, if filing jointly) understand that our fee for an amended return starts at \$150 and must be paid in advance.
3. By signing your tax return, you (and your spouse, if filing jointly) affirm that you (and your spouse, if filing jointly) have reviewed all expenses and other deduction amounts on **all** schedules (including the itemized deductions on Schedule A, if applicable) and they are accurate and you (and your spouse, if filing jointly) have all required supporting written records.
4. You (and your spouse, if filing jointly) 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 only provide guidance concerning what evidence is acceptable.

5. By signing your tax return, you (and your spouse, if filing jointly) are attesting that the completed return is true, correct, and complete to the best of your knowledge and beliefs and you (and your spouse, if filing jointly) have reviewed the return carefully before signing to make sure the information is correct.
6. Fees must be paid before your tax return is filed. If you (and your spouse, if filing jointly) terminate this engagement before completion, you (and your spouse, if filing jointly) agree to pay a fee for work completed.
7. If you (and your spouse, if filing jointly) choose to have your tax preparation fees withheld from your tax refund and, for whatever reason, your refund is intercepted, you (and your spouse, if filing jointly) are still responsible for paying the tax preparation fee we charged. Please contact the office as soon as possible to set up payment arrangements.

Signatures. By signing below, I acknowledge and agree that I have read, understand, and agree to the items outlined in this agreement.

- ***If this is a joint tax return, a signature by at least one party signifies agreement by both parties.***
- ***Keep a copy of your tax return and any related tax documents. We charge a \$5 fee to reprint a copy.***

Print Name

X

Client Signature

Date

Print Name

X

Client Signature

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 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.