

Creekside Income Tax LLC
2151 Hess Rd, Appleton, NY 14008
716-778-5120

General Engagement Letter for Individual Tax Return Preparation

This letter is to inform you, the taxpayer(s), of the services we will provide you, and the responsibilities you have for preparation of your tax return. This engagement letter is required before we begin preparation of your income taxes.

Tax Return Preparation

- We will prepare your 2024 Form 1040, U.S. Individual Income Tax Return, and applicable 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.
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
- The charges for our services are based on our fee schedule and the complexity of the returns.
- 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 may 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.
- You must review the return carefully before signing to make sure the information is correct. You have the final responsibility for your income tax returns.
- Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed.

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

Taxpayer

Date

Spouse

Date

Creekside Income Tax

Date

Data Privacy Policy. We have 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.