Engagement Letter

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements:

- [ ] We will prepare your federal and requested state income tax returns from information that you furnish us. It is your responsibility to provide all the information required for the preparation of complete and accurate returns. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information.
- [ ] We will keep your information **strictly confidential:** however, privileged communications do **NOT** extend to tax return preparation. We are obligated to prepare complete and accurate returns based on all of the information that you provide to us--whether **verbally or in writing.**
- [ ] You should retain all documents, canceled checks and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority.
- [ ] You have the final responsibility for the income tax returns; and, therefore, you should review them carefully before you sign them.
- [ ] Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover embezzlement, misappropriation of funds (defalcations), or other irregularities, should any exist.
- [ ] We may render such accounting and bookkeeping assistance as determined to be necessary for preparation of the income tax returns. The fee for this service is separate and in addition to the fee for the preparation of income tax returns.
- [ ] We will use professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.
- [ ] The law provides various penalties that may be imposed when taxpayers understate their tax liability. If you would like information pertaining to these penalties, please contact us. The taxpayer is solely responsible for all penalties.
- [ ] Your returns may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination, we will be available, upon request, to represent you. This will require a separate engagement letter. Our fee for these services will be based upon the amount of time required at standard billing rates plus out-of-pocket expenses.
- [ ] All invoices are due and payable upon presentation and will be assessed a 2% fee per month past due. We will not file or release returns if our fee has not been paid. Your nonpayment of our fees acknowledges your responsibility for any additional taxes, penalties, interest or other costs associated with the non-filing of any tax returns.

If the foregoing fairly sets forth your understanding, please sign and date below

Taxpayer Signature: _____ Date: _____

Print Name _____

Spouse Signature: _____ Date:_____

Print Name: _____