

# EDWARDS TAX & FINANCE SERVICES, LLC

## Engagement Letter – 2025

### 1. Scope of Services

Edwards Tax & Finance Services, LLC ("Preparer") will prepare and electronically file your federal and/or state income tax return(s) based on information you provide. Services are limited to tax preparation and related forms agreed upon for the applicable tax year(s).

This engagement **does not** include:

- IRS or state audit representation
- Legal or financial planning advice
- Amended returns and/or prior-year corrections
- Bookkeeping or payroll services (unless agreed to in writing).

### 2. Client Responsibilities

You agree to:

- Provide accurate, complete, and truthful information
- Maintain copies of all supporting documents
- Review your completed return before signing
- Notify Preparer of any changes or errors immediately

If required information is not provided in a timely manner, filing may be delayed or an extension may be recommended.

**You are ultimately responsible for the information reported on your return**, even if prepared by Edwards Tax & Finance Services, LLC.

### 3. Accuracy, Estimates & IRS Outcomes

Tax calculations are based on current tax law and information you provide.

Preparer makes no guarantee regarding:

- Refund amounts
- Timing of refunds
- IRS or state acceptance
- Refund advance approval

All estimates provided are **non-binding**.

## 4. Fees & Payment

- Fees are based on the complexity of the return and forms required.
- All preparation fees are earned upon filing and are non-refundable once a return is submitted.
- Fees may be paid upfront or deducted from the refund through an authorized third-party bank partner when applicable.
- Amended returns and prior-year corrections are billed separately and are not included in the preparation of the original return unless agreed to in writing.

Failure to pay fees may result in services being suspended.

### **Additional Administrative Time Fee**

Edwards Tax & Finance Services, LLC reserves the right to apply an additional administrative fee in situations where client behavior or circumstances significantly increase the time or administrative resources required to complete the tax preparation process.

Such situations may include, but are not limited to: repeated document resubmissions, failure to provide accurate or complete information, non-responsiveness, delays that hinder timely preparation, or excessive or disruptive communication.

This fee may be applied during or after the preparation process and will be disclosed to the client prior to finalizing and filing the return.

## 5. Refund Processing & Bank Products

If you elect to use refund-based products (including refund advances or fee withholding):

- These services are offered by third-party banks, not Edwards Tax & Finance Services, LLC
- Approval, funding, and timing are determined solely by the bank and IRS
- Preparer is not responsible for delays, denials, offsets, or holds

You agree to review and sign all applicable bank disclosures.

## 6. Refund Timing

Typical refund processing times are determined by the IRS and state agencies.

Edwards Tax & Finance Services, LLC has no control over processing speed after a return is accepted.

## 7. Electronic Signatures

You authorize Edwards Tax & Finance Services, LLC to use electronic signatures, including Form 8879, for e-filing your tax return.

## 8. Record Retention

Preparer will retain a copy of your completed tax return as required by law. Supporting documents you provide remain your responsibility.

## 9. Data Security & Privacy

Edwards Tax & Finance Services, LLC maintains a Written Information Security Plan (WISP) and reasonable safeguards to protect your personal information. Despite best practices, no system can guarantee absolute security.

## 10. Referrals & Marketing

Edwards Tax & Finance Services, LLC may, at its discretion, offer non-cash referral acknowledgments such as gift cards or credits toward future tax preparation services as a courtesy for referrals.

Referral acknowledgments are not guaranteed, are not based on tax outcomes or refund amounts, have no cash value, are non-transferable, and may expire. Referral acknowledgments do not affect the fees charged for current services.

## 11. Limitation of Liability

Preparer's liability is limited to the fees paid for this engagement. Edwards Tax & Finance Services, LLC is **not liable** for penalties, interest, or damages resulting from incomplete, inaccurate, or late information provided by the client.

## 12. Dispute Resolution

Any disputes arising from this engagement shall be resolved through binding arbitration in the state of Virginia.

## 13. Acceptance of Terms

By signing below, you acknowledge that you have read, understand, and agree to the terms of this engagement.

Acknowledged and agreed:

Client Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_