

**Robert C. Davis Accountancy Corp.  
641 Woods Creek Dr Ste B  
Sonora, CA 95370-4842  
209-532-5548**

Print name: \_\_\_\_\_

**Please sign and return this letter and organizer with your documents. Work can not commence until a signed copy of this document is returned.**

The filing deadline for the tax return is **April 15th, 2025**. In order to meet this filing deadline, we must receive your information with the following completed forms by **March 21st, 2025**. If not received by that date, we will file an extension.

If an extension of time is required, we will use the information available to us at the time to prepare the extension. You should be aware that an extension only extends the filing date of your return, it does not extend time to pay your tax liability. **You must pay 100% of your tax liability by April 15, 2025. Please note that an additional \$100 will be charged if our office files an "Application for Automatic Extension of Time to File" for your income tax return.**

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 2024 federal and state income tax returns from information which you will furnish to us. 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 furnish you with questionnaires and worksheets to guide you in gathering the necessary information. Your use of such forms will assist in keeping the fee to a minimum.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, cancelled 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.**

You are responsible for foreign activities. By signing this letter, you acknowledge that you will inform us if you have income from foreign sources or if you have a signatory over any foreign account. **Please note, the penalties for failure to report foreign activities are severe.**

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations and/or irregularities, should any exist. We will render such accounting and bookkeeping assistance as determined to be necessary for preparation of the income tax returns.

The law provides various penalties that may be imposed when taxpayers understate their tax liability. If you would like information on the amount or the circumstances of these penalties, please contact us.

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 and will render additional invoices for the time and expenses incurred.

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. All checks must be made payable to Robert C. Davis CPA Inc.

Please note that the fee for preparation of your tax return **does not** include charges for replying to International Revenue Service or Franchise Tax Board correspondence, representation for audits relating to your tax return, or tax planning appointments. All other services rendered in this regard will be billed separately at an hourly rate.

If the foregoing fairly sets forth your understanding, please sign the enclosed copy of this letter in the space indicated and return it to our office. However, if there are other tax returns you expect us to prepare, please inform us by noting so at the end of the return copy of this letter.

We want to express our appreciation for this opportunity to work with you.

Very truly yours,

Robert C. Davis CPA

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

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