



## Client Engagement Letter

Dear Client,

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 2020 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. We must receive all information to prepare your return by Friday, March 26th, 2021 to ensure that your return will be completed by April 15, 2021. If we have not received all your information by March 26th, 2021, we cannot guarantee that your returns will be completed before the deadline. A rush fee may apply to appropriate situations.

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.

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, these services will all be billed separately at the appropriate hourly rate.

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.

The invoice you receive for your tax preparation does not include consulting, tax planning, estimates calculations, or IRS resolutions, these services will all be billed separately at the appropriate hourly rate.

Our fees for tax preparation will be based upon the time required to complete your returns billed at our standard hourly rate. Invoices unpaid 30 days past the billing date may be subject to an interest charge of one and half percent (1 ½%) per month of all delinquent balances.

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,

*The Walls Group, CPAs*

Agreement

Your signature below represents your agreement with the terms and conditions above. Notwithstanding your signature or lack thereof below, your acceptance of the onset of services or absence of written correspondence from you to The Walls Group CPAs suggesting the services are not desired, will be indicative of your agreement to the terms and conditions noted above.

DATE: \_\_\_\_\_  
\_\_\_\_\_ (Signature)

\_\_\_\_\_  
(Please Print Name)

DATE: \_\_\_\_\_  
\_\_\_\_\_ (Signature)

\_\_\_\_\_  
(Please Print Name)