



Clear View Tax Solutions, Inc.

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ENGAGEMENT LETTER for 2024 Tax Preparation

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.

We will prepare and submit to you for filing your federal and/or state income tax returns. This engagement only pertains to the 2024 tax returns and does not include any additional returns you may be required to file with other taxing authorities.

We will prepare the tax returns relying on the information and documents that you are providing to us. It is your responsibility to provide us with timely and complete information and documentation for the preparation of your returns. We may ask you to clarify certain items that you furnish to us, but we will not audit or verify any of this information. Therefore, our engagement cannot be relied upon to disclose errors, embezzlements, fraud or other illegal acts should they exist. However, we will inform you of any such matters that come to our attention.

Your cooperation and timeliness are essential in order for us to complete this engagement. It may be necessary to prepare an application for an extension of time to file your return when we do not receive your tax information *at least 30 days prior to the due date of your return*. Applying for an extension of time to file may extend the time available for a tax authority to undertake an audit of your return or may extend the statute of limitations. An extension only allows additional time to file a return; it does not extend the time to pay any taxes that are due.

We will use professional judgment in resolving questions where the tax law is unclear or where there may be conflicting 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 and interest that may be imposed on taxpayers for underestimated tax liability. If you would like more information on the amount or circumstances of these penalties, please contact us.

Your returns may be selected for review by the taxing authorities. If your tax return is selected for examination or audit, you may request that we assist you in responding to such inquiry. In that event, we would be pleased to discuss providing assistance to you under the terms of a separate engagement for that specific purpose. 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 fees for this engagement will be based upon the time required to complete your returns as well as complexity and additional schedules required. Invoices for services are due and payable upon presentation. Invoices unpaid 30 days past the billing date may be subject to an interest charge of 18% per annum. We reserve the right to suspend our services or to withdraw from this engagement in the event our invoices are not paid. If our services are terminated, you will be obligated to reimburse us for all costs through the date of termination.

Our maximum liability to you arising for any reason relating to services rendered under this letter shall be limited to the amount of fees you paid for these services. In the event of a claim by a third party relating to services under this letter, you will indemnify us from all such claims, liabilities, costs and expenses, except to the extent determined to have resulted from our intentional or deliberate misconduct.

If any dispute arises between and/or among the parties hereto, the parties agree first to try in good faith to settle the dispute through non-binding mediation. The costs of mediation shall be shared equally by the parties.

You should retain all documents and data that form the basis of income and deductions as these may be needed to prove accuracy and completeness of your returns. You have the final responsibility for reviewing and signing your tax return. We are required to e-file all returns, if possible. We will not e-file your returns until the necessary signatures are received.

In the event information is requested by any of the parties signing this return, that information will be furnished without obtaining the additional consent of any other party.

To confirm that you agree with the services and terms of this engagement, please e-sign where indicated at the bottom of this letter. If you are unable to e-sign, please print, sign and return a copy of the engagement letter via info@clearviewtaxsolutions.com or by mailing to our office. If we do not receive the executed copy of this agreement from you, receipt of your tax return data and/or organizers for Individuals will acknowledge your acceptance of the terms of this agreement. Should you have any questions regarding these requirements or provisions, please feel free to contact us.

Sincerely,
Clear View Tax Solutions, Inc.

Primary Taxpayer SIGNATURE: _____

Primary Taxpayer NAME: _____

DATE: _____

Spouse SIGNATURE: _____

Spouse NAME: _____

DATE: _____