

## INDIVIDUAL TAX RETURN ENGAGEMENT LETTER

Dear Client:

This letter confirms the terms of our engagement with you and the nature and extent of the services we will provide.

We will prepare your federal and all state income tax returns using the information you provide to us. We may ask for clarification of some items, but we will not audit or otherwise verify the data you submit. The completed Client Information Sheet is designed to assist you with gathering all the information required to complete your return, along with providing us necessary data to ensure accuracy. Therefore, it is essential that this Client Information Sheet be completed in its entirety and signed prior to preparation of your tax return.

It is your responsibility to provide information required for preparation of complete and accurate returns. You should keep all documents, canceled checks and other data that support your reported income and deductions. They may be necessary to prove accuracy and completeness of the returns to a taxing authority. You are responsible for the returns, so you should review them carefully before you sign them.

Our fees for this work will be based on the complexity of your tax return, the amount of time required to complete the return, including time spent following up on incomplete or missing information and documents, plus any out-of-pocket expenses. If you require an estimate, we will give you a non-binding estimate based upon your representations about the complexity of your returns. All tax return invoices are due and payable upon presentation to you and prior to us submitting them on your behalf.

Our fees include the following:

- 1040 Federal and State returns with schedules.
- Estimated tax payments calculation.
- Client meeting – one 60 min. client meeting is included in the fee. Fees will be adjusted for additional meetings.
- Client phone calls and emails to answer basic tax questions. Additional fees may apply for calls and emails that require research or are related to tax planning.
- Tax questions and tax information – no charge for general tax information. Exception will be for advanced research.
- ONE copy (electronic or paper) of your tax return. If additional copies are requested they will be provided for an additional fee.

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. If the government selects your returns for review, we can arrange to represent you. Such representation will be a separate engagement for which an engagement letter will be provided to you. Fees and expenses for defending the returns will be invoiced in accordance with terms we agree on for that engagement.

In the unlikely event of a calculation error in the preparation of your tax return, we will reimburse you for any penalty for which we made you liable, provided the information that you supplied us was correct.

We are committed to the safeguarding of your confidential information and we maintain physical and electronic safeguards to protect your information within our office. Unless required by law, we will not disclose any information about you unless we have your written approval as required under Reg. §301.7216-3(a)(1), even if you are no longer a client.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign this letter in the space indicated below and we will retain a copy in your client file.

Again, we want to express our appreciation for the opportunity to work with you, and hope that you will bring any questions or concerns to our attention.

Sincerely,  
JNS Tax Services Inc

_____ Taxpayer Signature	_____ Print Name	_____ Date
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_____ Spouse Signature	_____ Print Name	_____ Date
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