

THE PARTIES: This Agreement is between P. Sue Lobdell and Client:

Taxpayer or Entity\* \_\_\_\_\_

Tax Year(s): \_\_\_\_\_

Tax Type (circle all that apply): 1040 1041 1065 1120S 1120 990 \_\_\_\_\_

State Return Yes / No: \_\_\_\_\_

This agreement is written to confirm our understanding of the terms of our engagement and the nature and extent of the income tax preparation services this office will provide.

We will prepare your Federal/State Tax Return for the year(s) specified above. We may ask you to clarify or substantiate some of the information. We will be available to assist and guide you in gathering the necessary information by furnishing you with questionnaires and worksheets, and by answering your questions.

It is your responsibility to provide all the information necessary to complete your tax return. You need to retain all documents and records to substantiate the items of income and expenses claimed on your tax return. Since you have the final responsibility for the information on your tax return, it is highly recommended that you review your return carefully before signing it.

We will perform accounting services as needed to prepare your tax returns at the rate of \$85/hour. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts. We will, of course, inform you of any material errors, fraud, or other illegal acts we discover.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt the alternative you select.

We will retain our work papers and a copy of your tax return for seven years. All your original records will be returned to you with your tax return. If you should need additional copies of your tax return, we will provide that directly to you.

Fees for our services are based on forms; you may request an estimate at the time of your appointment. Prepared returns will not be released or electronically filed without full payment. Our engagement ends when you have signed your return and it has been accepted by e-file or mailed to the IRS; or one year after this engagement is signed, whichever comes first. All returns are subject to review by taxing authorities.

Virtual Accountant Pros stands behind our work. However, examinations or inquiries do occur, we are here to represent you, but as a separate engagement. This is not a continuation of your tax



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preparation services. Tax Notice Engagements are charged on a retainer basis. If our investigation into your issue determines that the cause was an error or omission made by Virtual Accountant Pros, your Tax Notice Resolution will be at no charge. Errors and erroneous notices made by any taxing authority, or government agencies are considered billable as we have no control over these occurrences.

This agreement also informs you of our privacy policy. We value your trust and confidence and want to assure you that we keep information about you secure and confidential. We adhere to the highest level of professional ethical standards and obligations to protect the confidentiality of all client information. We do not disclose any nonpublic personal information about our clients or former clients to anyone. We restrict access to non-public personal information to those professionals necessary to prepare your income tax return, and maintain physical, electronic and procedural safeguards to protect your non-public information.

Thank you for this opportunity to work with you.

To affirm that this letter correctly summarizes your understanding of the engagement of Virtual Accountant Pros for your Income Tax Preparation Services, please sign the enclosed copy of this letter in the space indicated and return it to us.

Accepted By:

\_\_\_\_\_  
Taxpayer Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse Signature

\_\_\_\_\_  
Date

