

Edge CPA LLC  
1040 Engagement Letter

*Tax Season 2026* (for 2025 tax returns) **Please read through** your 2025 tax preparation engagement letter-you (and your spouse if applicable) will need to sign below and send back to us as soon as possible.

We want to update and remind everyone of some important things regarding the upcoming 2026 tax filing season for 2025 tax returns:

- The IRS will open tax season on 1-26-26. However, this does not mean all forms required to complete your tax return will be available at that time.
- The **tax filing deadline** this year is April 15, 2026. As a reminder, an **extension only extends the due date of the tax return, NOT the due date of any TAX DUE.** Taxes are still due April 15, 2026. The penalty for not paying all of your taxes by 4/15 is .005/month if an extension is filed. If an extension is not filed, the penalty is .05/month.
- If you think you will need to file an extension, please do so at <https://www.efile.com/tax-extension/> . Be sure to save a copy of the confirmation and include it with your tax documents. **While we file extensions as a courtesy, it is ultimately the client's responsibility and we will not be responsible for any penalties/interest incurred if an extension is not filed.**
- We have an **annual client tax questionnaire** that everyone (couples filing joint need to fill out one per couple) will need to fill out. We cannot start working on your return without this questionnaire.
- The following items will be **required before we can submit your return(s) to the IRS:**
  - Form 8879 IRS E-File Signature Authorization -this form is generated when we prepare your tax return
  - Payment for services- we will send electronic invoices with your completed return- you will receive a separate electronic invoice by email. Once you receive your tax return to review, our fee is due regardless of whether you chose to file the tax return through us or not.
- Please **do NOT send any tax documents over regular email**, as it is not secure. **Please use your ShareFile link to upload documents.** We reserve the right to refuse documents not sent through ShareFile, especially if we feel there is a security risk. If you do not yet have access to ShareFile, please email Donna or Jessica.
- If you have a business or rental property and you only provide us with receipts/invoices and you have not totaled/compiled the amounts for us by expense category, we will bill to compile all the data at our current hourly rate.
- **Assigned Start Date During the Login Process:**

- We will be assigning you a “tax preparation start date” again this year so you will know where you are in the que. This is the date we start preparing your return. **We will not assign this date until we are done with the login process. The login process is complete once you have uploaded ALL of your documents, including additional documents requested during the login process.** Please be sure to email us when you are done uploading your documents and when you are done uploading any additional documents we request. Returns will be worked on in the order received, so if you are concerned about not having it prepared before the 4/15 deadline, please upload your documents sooner rather than later.
- Access to **required questionnaires** and additional copies of the Engagement letter will be available at <https://businessharmony.life/client-documents> Please be sure to download the applicable documents and include when you upload your tax documents to ShareFile. As mentioned above, we will not be assigning start dates until we receive any initial missing documents, including the questionnaires.
- **Important cutoff dates:**
  - We need all tax documents by 3/15/2026 to file by 4/15/2026.
  - If you normally file later in the year, we need all tax documents by 8/21/26 to file by the 10/15/26 extension deadline.
- Our fees are subject to annual review.
- **Email correspondence**-we do our best to respond in a timely manner. However during busy season it may take longer than usual to respond. We appreciate your patience. At times we may send “bcc” emails (or use a CRM platform) to relay important information to all clients. If you opt out of these, you may miss important tax information (we promise not to send too many).

**Please print and sign below to indicate you have read this and include this with your tax documents.**

Taxpayer name : \_\_\_\_\_ Signature: \_\_\_\_\_

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

Spouse name: \_\_\_\_\_ Signature: \_\_\_\_\_

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

Please do not hesitate to contact us if you have any questions.

Thank you!