



S.P.I.T.S.



SKINNER'S PROFESSIONAL INCOME TAX SERVICES

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Tax Engagement Letter



2025 Tax Preparation Engagement Letter

Date: _____ Client(s): Name: _____

We appreciate the opportunity of working with you. It is important for us to minimize the possibility of any misunderstandings while working together. This letter is to confirm and specify the terms of our engagement with you and clarify the nature and extent of the services we will provide.

We will prepare your 2024 Federal Form 1040 and 2024 state and local tax returns from the information you provide to us. We will not audit or otherwise verify the data you submit although it may be necessary to clarify some of the information. **It is your responsibility to provide all the information required to prepare an accurate tax return. You are also responsible for determining that all necessary state and local tax returns have been prepared.**

We will furnish you with tax organizers and checklists to help you gather and organize the necessary information to prepare your return. This helps us minimize our fees. Our fees do not include responding to inquiries or examination by taxing authorities. We are available to represent you and our fees for such services are separate from your tax preparation fees. A separate engagement letter will be furnished to provide such services.

We require a \$50 nonrefundable deposit to begin preparing your return to cover administrative costs.

We will use professional judgement to resolve questions in your favor where the tax law is unclear if there is reasonable justification for doing so. Whenever there is possibly applicable tax law that is unclear or conflicting interpretations of the law by authorities (e.g., tax agencies and courts), we will explain the possible positions that may be taken on your return. We will follow your request as long as it is consistent with the codes and regulations that have been promulgated. If the IRS or state should later contest the position taken, there may be an assessment of additional tax plus interest and penalties. We assume no liability for any such additional penalties or assessments.



Your return may be selected for review by the taxing authorities. Proposed judgements by the examining agent are subject to certain rights of appeal. It is your responsibility to maintain your documentation used to prepare your return and support the data you provided. This includes but is not limited to auto, travel, meals, rental property expenses and the required documents to support all charitable contributions.

We must receive all information to prepare your return by March 15, 2025, to ensure that your return will be completed by April 15, 2025. If we have not received all of your information by March 15, 2025 and your return is not completed by April 15, 2025, you may be subject to late filing and/or late payment penalties and interest on any balance due. **We do not automatically file tax extensions unless requested to do so and have a signed engagement letter.**

Our fees for these tax services are based on the amount of time required, complexity of the return and forms necessary to file a complete return. **All invoices are due and payable the day you pick up your completed tax return.**

****Note: If you have an old outstanding balance, payment must be received in full before any work will be done on your tax return. Additionally, no further work will be performed when an unpaid balance over 60 days is outstanding, unless we come to an agreement.***

Our services are concluded upon delivery of the completed tax returns discussed above or upon our resignation from the engagement.

We appreciate the opportunity to serve you. Please sign and date the enclosed copy of this letter to acknowledge your agreement with and acceptance of your responsibilities and the terms of this engagement. It is our policy to initiate services after we receive the executed engagement letter.

Sincerely,

Skinner's Professional Income Tax Services

I have read the above terms of the engagement letter and agree with the terms of the engagement.

Taxpayer Signature:_____ **Date:**_____

Spouse Signature:_____ **Date:**_____