

2017 ENGAGEMENT LETTER

Changes in the Preparation of Your **2017** Tax Return(s):

Thank you for choosing FNC Tax Service LLC to assist you with your 2017 taxes.

This year you will have 4 options to receive your refund:

- **Direct Deposit**
 - **Printed Check**
 - **Visa Prepay Card**
 - **IRS Check mailed to you** (preparation fee paid before E-filing)

We will prepare your 2017 Federal and State income tax returns. We depend on you to provide the information we need to prepare complete and accurate returns. Attached to this letter you will find the following forms that will need to be Signed and Returned:

- **Privacy Policy** (yours to keep no need to return to us)
- **Consent to Use** (to use your information provided)
- **Consent to Disclose** (to send information E-file)
- **Data Entry Form**
 - **Include copy of your driver license (plus spouse) and SS cards**
- **Healthcare** (Send form 1095-A or 1095-C)
 - **not providing this will cause weeks of DELAY on your Refund**
- **EIC Due Diligence** (only if dependent is **not** Son or Daughter)
 - **Include copy of SS card/cards without this we cannot claim**
- **Schedule A** (itemized deductions **if not filled out Standard will be taken**)
- **Direct Deposit Form**

Upon Request Only

- Education Credit
- Schedule C (self employed business income)
- Schedule E (if you had or have rental property)
- Health Hardship Application (upon request only)

We may ask you to clarify some items but will not audit or otherwise verify the data you submit. It will be necessary for you to clarify (provide receipts) some of the information you submit IF the amount seems Excessive. We will, of course, inform you of any material errors, fraud, or other illegal acts we discover.

The law imposes penalties when taxpayers underestimate their tax liability. Please call us if you have concerns about such penalties. 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, on your behalf, the alternative you select.

Our flat rate fee of \$480 includes everything (add \$25 for State taxes and \$300 for Business taxes.) (Business Taxes is NOT Sch C)

- Preparation of Return
- Projected Bank/Check Fee
- Software/Transmit Fee & 3 year Audit with ID Protection

ALL returns will be E-filed.

In the event that any projected refund is kept by the Internal Revenue Service (IRS) payment is expected to be made to FNC Tax Service LLC within 15 days of acknowledgment. An interest charge may be added to all accounts not paid within thirty (30) days to the extent permitted by Florida State law.

We will return your original records to you at the end of this engagement. You should securely store these records, along with all supporting documents, canceled checks, etc., as these items may later be needed to prove accuracy and completeness of a return. We will retain copies of your records and our work papers for your engagement for three (3) years, after which these documents will be destroyed.

Our engagement to prepare your **2017** tax returns will conclude with the delivery of the completed returns after they have been Signed and returned to us for E-Filing. However, if you select not to e-file your returns with our office, and you choose to mail in (Fees must be paid in advance); IRS now requires a preparer explanation for not filing electronically and a form 8948 will need to be attached to your return. You will be solely responsible to file the returns with the appropriate taxing authorities.

Review all tax-return documents carefully before signing them. To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign the enclosed copy of this letter in the space indicated and return it to us.

We appreciate your confidence in us. Please call if you have questions.

Sincerely,

Cindy Couch

FNC Tax Service LLC

(Both spouses must sign for preparation of joint returns.)

Accepted By:

Taxpayer

Spouse

Date

By signing this you agree to all the above conditions. With no exceptions unless it is in writing and signed by both Taxpayer and FNC Tax Service LLC