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General Engagement Letter for Individual Tax Return Preparation

This letter is to inform you the taxpayer of the services we provide to you and the responsibilities you have in regard to the preparation of your tax return. Please review this information thoroughly and in its entirety. Should you have any questions, please discuss this with your tax preparer.

Tax Return Preparation

- We will prepare your (_____) federal and state tax returns based solely on the information you provide. Services for preparation of your return do NOT include any auditing or verification of the information you provide.
- This engagement does not include any audit or examination of your books or records. If your return is audited, you are responsible for verifying the items/information reported.
- You are responsible for reviewing the return carefully before signing to make sure all information is correct.
- Tax preparation fees are based on a fee schedule per form and/or schedules needed/required to complete your return and does not include bookkeeping. Additional charges may include but are not limited to: **research basis of stocks/bonds or assets bought/sold; *NOLs, *multi-state returns filed; *accounting for an entire year; *tax consultation for estimates; *amended tax returns for current/ prior years*
- Fees **MUST BE PAID** before your tax return is delivered to you or submitted for filing. If you terminate this engagement before completion, you agree to pay a fee for any work completed. A retainer is required for preparation of late returns.
- Tax preparation fees do *not* include audit representation or preparation of materials needed to respond to taxing authorities.
- Preparation fees do cover limited assistance and consultation during the year.
- This engagement terminates upon delivery of your completed return and original documents to you. You are responsible for retaining supporting documentation and tax returns for at least 7 years.
- While we strive for accuracy, mistakes can occasionally occur. We ask for forgiveness should this arise. Please remain courteous and let us know if you receive any notification from the government as soon as possible. We do correct returns and pay any penalty if we are at fault. **We are not responsible for payment of any taxes owed.*

Taxpayer Responsibilities:

- You agree to provide complete and accurate income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to provide such information to ensure your completed return contains all relevant information.
- You affirm that all expenses/deduction amounts are accurate and you can provide written supporting documentation. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.

Signatures: By signing below, you acknowledge that you have read, understand and accept your obligations and responsibilities and that you understand Dollar Income Tax Services responsibilities in preparing your tax return as explained above. By signing you also acknowledge receipt of our Privacy Policy. ** For Joint Returns – both taxpayers must review and sign.

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| Tax Payer Signature: | | Date: | |
| Spouse Signature, if applicable: | | Date: | |

Privacy Policy: The nature of our work requires us to collect certain nonpublic personal information about our clients. This information may include financial and personal data obtained from applications, worksheets, reporting statements, interviews, conversations, and other forms provided by you. We may also review banking or credit card information solely for the purpose of processing payments. Under our policy, all personal information we collect is either provided directly by you or obtained with your authorization. We maintain strict procedures and safeguards to protect your confidential information. Access to personal information is limited to authorized personnel within our firm who require it to provide services to you. We do not disclose your personal information to any third party without your express consent, except as required by law. Our firm maintains physical, electronic, and procedural safeguards that comply with federal regulations to protect your personal information from unauthorized access. If you have any questions regarding this privacy policy, please contact our office.