

## JULIE'S TAX SERVICES

P O BOX 157  
WEST SALEM, WI 54669-0157  
608-786-3852 OFFICE  
608-786-0228 FAX  
[WWW.JULIESTAXSERVICES.COM](http://WWW.JULIESTAXSERVICES.COM)

## Client Engagement Agreement

This Engagement Letter ("Agreement") confirms the terms and conditions under which Julie's Tax Services of West Salem ("Firm," "we," "us," or "our") will provide professional services to Clients ("Client," "you," or "your").

This Agreement is legally binding beginning on the date agreement signed and covers all services performed under agreement indefinitely. (New Engagement Agreement required every year for new services performed.)

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### **1. Scope of Services**

We will provide the following services:

- Preparation of federal, state, and/or local income tax returns for tax year(s)
- Tax planning and advisory services
- Bookkeeping and accounting services
- Payroll services
- IRS or state tax authority representation (only if separately agreed in writing)
- Other: **Discuss with Julie's Tax Services to determine capabilities**

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### **2. Client Responsibilities**

You agree to:

- Provide complete, accurate, and timely information necessary to perform the Services
- Maintain all required records and documentation
- Review all returns, reports, and filings prior to submission
- Notify us promptly of any changes, notices, or correspondence from taxing authorities

You acknowledge that you are **ultimately responsible** for the accuracy of all information provided and all filings made on your behalf.

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### **3. Firm Responsibilities**

We will:

- Perform the Services with due professional care in accordance with applicable professional standards and Circular 230
- Inform you of material issues identified during the engagement

We do **not** audit, verify, or independently validate information unless expressly agreed in writing.

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### **4. Fees and Payment Terms**

All fees are **earned as work is performed** and are non-refundable.

### **5. Tax Positions and Advice**

We may provide tax advice based on current laws and guidance. You acknowledge that:

- Tax laws are subject to change

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- Outcomes are not guaranteed
- We do not guarantee acceptance of any position by a taxing authority

***You are responsible for final decisions regarding tax positions taken.***

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***You are responsible for final decisions regarding tax positions taken.***

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#### **6. Limitation of Liability**

To the fullest extent permitted by law:

- Our liability for any claim arising from this Agreement shall be limited to the amount of fees paid for the specific Services giving rise to the claim
- We shall not be liable for consequential, incidental, or punitive damages

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#### **7. Indemnification**

You agree to indemnify and hold harmless the Firm from any claims, penalties, interest, or liabilities arising from:

- False, misleading, or incomplete information provided by you
- Failure to comply with laws or filing requirements

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#### **8. Confidentiality**

We will maintain the confidentiality of your information in accordance with applicable laws and professional standards. We may disclose information if required by law, subpoena, or professional obligation.

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#### **10. Termination**

Either party may terminate this Agreement at any time verbally:

- You remain responsible for fees incurred for all work performed
- Any completed work will be provided upon payment of outstanding balances

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#### **14. Acceptance and Acknowledgment**

By signing below, you acknowledge that you have read, understand, and agree to all terms of this Engagement Letter.

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**Client Name (First & Last):** \_\_\_\_\_

**Client Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_