



Engagement Letter

Dear Client:

Thank you for choosing Williams Accounting & Tax Services LLC to assist you with your taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide. We will review your current federal and state income tax returns. We will depend on you to provide the information we need to complete an accurate assessment and provide recommendations. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. Review or revision of prior year(s) returns is also available at an additional charge.

We will perform services only as needed to review, revise or prepare your tax returns. Our work will not include procedures to find misappropriated funds or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. 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 fee will be based on the time required at the standard hourly billing rate plus any out-of-pocket expenses. The fee for this service has been quoted based on the answers provided in the Free Tax Prep Quote. If we find that information has been omitted or you provide additional information during the preparation process, additional fees may apply, increasing the total cost of the service. We will notify you if the price increases, allowing you to continue or discontinue service with our office. Amending a return originally prepared by our office free of charge. Invoices are due and payable upon presentation of the client preview and before scheduling an off-boarding meeting. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (30) days. Bank products offered will adhere to the policy and disclosures of the third-party vendor.

Required supporting documents must be submitted within 15 business days of the latter of receipt of this agreement and registration. Should you require additional time to gather and upload your documents, kindly inform us via email. Payment of fees is required prior to off-boarding, which includes taxpayer review, e-signing, submission, and transmission of the tax return to the IRS. Failure to remit payment and/or provide the necessary documents will result in the following actions:

- (1) Free Extension Filing for returning paid clients 1040 on April 10th of the current year,
- (2) \$165 Extension Filing Fee for Business Returns on March 10th of the current year, and/or
- (3) automatic termination of the engagement, releasing the company from any obligation to file taxes for the current year.

Extensions for new prospective 1040 clients are available at a fee of \$100 via our website and have no obligation to file a tax return with our office.



This engagement includes two scheduled meetings via Calendly:
One Tax Onboarding Meeting limited to 15 minutes
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Additional meetings, limited to 45 minutes each, are available for \$350.

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 return copies of your records and our work papers for your engagement for seven years, after which these documents will be destroyed.

Our engagement to prepare your tax returns will conclude with the delivery of our analysis of your return along with any recommended clarifications or corrections. If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax return documents carefully before signing them.

Williams Accounting & Tax Services LLC reserves the right to deny or terminate services immediately if the client is unresponsive for more than 5 business days, uncooperative, suspected of fraud, or abusive towards our staff.

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.

We are pleased to assist you with your tax matters and look forward to working with you.

Sincerely,

Brandi C. Williams

Brandi C. Williams, EA, MAcc
Founder of Williams Accounting & Tax Services LLC



● Tax Preparation Exclusions ●

State-Based Exclusions

Taxpayers not eligible if they reside in California, Oregon, Maryland, and New York

Exception: Active duty military in Maryland and New York are eligible

Community Property States – MFS

Taxpayers filing Married Filing Separately (MFS) in these states are excluded: Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington, Wisconsin

Also excluded: The spouse of a taxpayer filing MFS in any state

Improper Head of Household Filing

Married taxpayers cannot claim Head of Household if:

- No divorce decree or legal separation by year-end
- Lived with spouse during the tax filing year.

*This list is not all inclusive and other exclusion may apply on a case-by-case basis.