2024 Tax Season Engagement Letter

**Thank you for choosing Kandis Craddock Accounting & Tax Services to assist you with your 2024 (&/or prior year) taxes! This letter confirms the terms of my engagement with you, and outlines the nature and extent of the services I will provide**.

**COMPENSATION**: Fees are generally form based. Pricing is based upon the complexity of your tax return. Since every person's return is unique, it is not possible for me to know exactly what your preparation fee will be until I have seen and interpreted all of your tax information. Fees have increased in 2024. Minimum return for both Federal and State is $75.

**My fee is due and payable before your completed tax returns are filed. I will invoice through TaxDome and you may pay with CC/Debit Card or via Bank Draft.**

**TAX SERVCES: I will prepare your Federal and State Income Tax Returns, as required. I will depend on you to provide me with the information I need to prepare complete and accurate returns. I may ask you to clarify some items, but I will not audit or otherwise verify your data.**

**EXTENSIONS: As soon as you realize you can’t get all your documents and tax information to me by April 1st 2025, &/or (after checking with me) are unable to get an appointment on my schedule by April 10th, 2025, with your permission I will file an Extension of time to FILE until October 15th, 2025. This is not an extension of time to pay and taxes you may owe, so penalties and interest will apply if you end up owing taxes to Federal and/or State.**

**My engagement to prepare your tax returns will conclude with the delivery of your completed returns to you via my secure file portal and the successful e-file submission of your tax returns. You are ultimately responsible for the contents of your tax returns! Review all tax documents carefully before signing them.**

**Any returns that I do not e-file are your sole responsibility to snail mail to the taxing authority before the due dates for those returns. If you are required to snail mail paper returns, I will provide you with print-ready PDF files which will include mailing addresses as well as all attachments in proper order and with all signature locations highlighted.**

**RECORDS: Your original records will be scanned and stored in my secure file portal at the end of this engagement. You should securely store these records, along with all supporting documents (e.g., receipts) for at least 3 (three) years, as these items may be needed to prove the accuracy and completeness of your return. Receipts can be stored as paper or as electronic records. The source documents that I use to prepare your return and copies of your completed tax returns will be stored online in my secure file portal.**

**CONSULTATIONS: I’m available for questions and consultations throughout the year. Please talk to me before making major decisions that will affect your taxes!**

**SIGNATURES: To affirm that this letter correctly summarizes your understanding of our arrangements for this work, please acknowledge receipt of this letter within the portal. I appreciate your confidence in me! And as always, contact me if you have any questions.**