



Tax Preparation Services Engagement Letter

Please read this document thoroughly, and have all questions answered, before signing and returning. If you are accessing this document via MyTAXPortal, you may click Accept to accept the terms in lieu of your signature(s). Otherwise, you may sign this document electronically using the Fill & Sign tool in Adobe Acrobat. A handwritten signature is acceptable, but not required. I must have this accepted, or signed/dated letter returned with your tax documents BEFORE I can begin preparation.

DAVE CANELL TAX SOLUTIONS will prepare your 2023 federal and state tax returns based on the information and tax documents provided. If you are required to file additional state or local tax returns, you agree to notify me of those requirements. In order to assure I may provide complete and accurate returns, you agree to provide all required and relevant information, and documents to the best of your ability. You affirm that all information provided is accurate. I review all information provided to me; however, I will NOT perform any audit services for any documentation.

I will use my professional judgment in preparing your tax returns. If I become aware of unclear or conflicting tax law, I will explain the possible positions, and adopt whatever position you request IN WRITING if it is consistent with the relevant tax authority. If any tax authority later contests the position taken, there may be an assessment of additional tax plus penalties and interest. In such cases, I assume NO liability for any such assessments.

Please be aware the general deadline for filing 2023 individual federal tax returns is **MONDAY, APRIL 15, 2024**. An extension to file may be required if I do not receive all required information in a reasonable timeframe prior to filing deadline. If I feel an extension is necessary, I will notify you of this prior to executing this engagement. Please note that an extension to file is NOT an extension to pay any tax balance due. Penalties and interest may accrue on any balance unpaid after the filing deadline.

You agree to remit payment in full promptly upon your receipt and review of your tax returns and invoice. **PLEASE NOTE: I WILL NOT FILE YOUR TAX RETURNS UNTIL A) I HAVE RECEIVED PAYMENT IN FULL OF YOUR PREPARATION FEE, AND B) I HAVE RECEIVED YOUR WRITTEN CONSENT TO FILE YOUR TAX RETURNS.**

I will always strive to protect your private information. I will not provide any confidential tax information to third parties unless authorized in writing pursuant to Internal Revenue Code §7216.

I appreciate the opportunity to serve you, and I value you as a client. By signing below, you acknowledge you have read, understand, and accept your obligations and responsibilities, and that you understand my responsibilities. Please contact me with any questions or concerns.

Taxpayer Signature

Date

Spouse Signature (required for joint returns)

Date