



Last 4 of Social Security #: _____

Tax Payer: _____

Spouse: _____

General Engagement Letter for Individual/Small Business Tax Return Preparation

This letter is to inform you, the taxpayer, of the services we will provide you, and the responsibilities you and Affordable Accounting, LLC have for preparation of your tax returns only.

Tax Return Preparation

- We will prepare your 2025 Form 1040, U.S. Individual Income Tax Return, and state tax return(s) based on information you provide. **If including other years, list here:** _____
- This engagement does not include any audit or examination of your books or records. In the event your return is audited, you will be responsible for verifying the items reported.
- The tax return preparation fee does not include bookkeeping. Additional fees apply for these services.
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
- Preparation fees do cover limited assistance and consultation during the year.
- The engagement to prepare your 2025(or other declared years above) tax returns terminates upon delivery of your completed returns and/or original documents to you. Please store your supporting documents and copies of your tax returns in a secure place for at least seven years. **You will be assessed a fee if you request a copy in the future.**
- If we choose to not prepare your return(s), or we are unable to complete your return(s) before the tax deadline, you will be immediately contacted by phone first and then any means of communication we have for you. It is always your responsibility to file your tax returns on time with the proper tax authorities, NO MATTER WHAT. You must also pay 90% of what taxes you believe to be due by the tax deadline of your return, whether it is filed on time or not. *Affordable Accounting, LLC or any of its Preparers, are NEVER RESPONSIBLE for your tax returns being filed on time. You are always able to pick up your information at any time, for any reason. Any completed work, will produce a fee due when picking up an incomplete return.*

Taxpayer Responsibilities

- You agree to provide us ALL income and ALL deductible expense information. All W2's, 1099's, and any tax form you received by mail or email. If you receive additional information after we begin working on your return, contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. 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.
- It is always your responsibility to file your taxes on time with the proper tax authorities.
- You must review the returns carefully before signing to make sure the information is correct.
- **Fees must be paid before your tax return is filed for you.** If you terminate this engagement before completion, you agree to pay a fee for any work completed. *Minimum Charge of \$20 if already transferred to a Preparer.*

Signatures. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities and that you understand our responsibilities in preparing your tax returns as explained above. For a joint return, both taxpayers should sign. If only one spouse signs, this agreement becomes valid for both spouses.

Taxpayer _____ Spouse _____ Date _____

Privacy Policy. *The nature of our work requires us to collect certain nonpublic personal information about you from various sources. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. Under our policy, all information we obtain about you will be provided by you or obtained with your permission. Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know, to provide you with services. We will not disclose your personal information to any third party without your express permission, except where/if required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access. Please contact us with any questions regarding our privacy policy.*