

Mid-America Tax & Accounting

Engagement Letter Agreement

Your tax return(s) cannot be prepared until this engagement letter is signed and we receive it in our office

Primary Taxpayer Full Name:

How Did You Hear About Us?

Choose One

Personal Referral Name:

Do you live in, or work in, the CITY of St. LOUIS?

YES or NO

Legal Name of Business (if applicable):

REQUIRED: Page 4, type your full legal name, which constitutes your electronic signature and acceptance of this engagement letter.

Either spouse may complete and submit this engagement letter on behalf of both spouses and represents that they have authority to bind both spouses for purposes of this engagement.

After you download this Engagement Letter, "SAVE AS" to your computer with a unique file name like "2025 John Doe Engagement Letter". Open the new filename and enter your information. When finished, click SAVE.

The next tax season it will be very easy. You will Copy/Paste to your computer, then RENAME it for that year. Example "2026 John Doe Engagement Letter". Press **RESET** Button and all basic information will be retained (Taxpayer Name etc.), however, it will **RESET, Type of Tax Return, Tax Year, and Date Signed.**

RESET To Sign for New Tax Year

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Type of tax Return: Choose Personal or Business

Tax Year(s): Year To Prepare

If multiple years, enter all applicable years:

Thank you for choosing Mid-America Tax 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.

Our engagement is limited to performing the following services:

This engagement pertains only to the year(s) listed above, and our responsibilities do not include preparation of any other tax return years that may be due to any taxing authority. We are responsible for preparing only the returns referenced above. If you have taxable activity in a state or local municipality other than your state of residency, you are responsible for providing our firm with all the information necessary to prepare any additional applicable state and local income tax returns as well as informing us of the applicable states and local municipalities. If you have income tax filing requirements in any state or local municipality but do not file that return, there could be possible adverse ramifications such as an unlimited statute of limitations, penalties, etc.

This engagement letter does not cover the preparation of any financial statements, sales and use tax, or gift tax returns, which, if we are to provide, will be covered under a separate engagement letter. If we need to prepare spreadsheets or other documents to accumulate the data we need to prepare your returns, you are responsible for those additional charges. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit, unless we deem it necessary. We have tax organizers available to help you collect the data required for your return. The Organizers will help you avoid overlooking vital information. By using them, you will contribute to efficient and accurate preparation of your returns and help minimize the cost of our services.

Our work will not include procedures to find defalcations 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. 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 legal alternative you select.

You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them, or AUTHORIZE us to Efile on your behalf. We are not responsible for the disallowance of doubtful deductions or inadequately supported documentation, nor for resulting taxes, penalties and interest.

The Internal Revenue Service imposes penalties on taxpayers, and on us as return preparers, for failure to observe due care in reporting for income tax returns. To ensure an understanding of our mutual responsibilities, we ask all clients for whom we prepare tax returns to confirm the following arrangements.

CONTINUED TERMS, FEES & LIMITATIONS

Federal, state, and local taxing authorities impose various penalties and interest charges for non-compliance with tax law, including for example, failure to file or late filing of tax returns and underpayment of taxes. You as the taxpayer remain responsible for the payment of all taxes, penalties and interest charges imposed by taxing authorities. If we determine, at our sole discretion, that we may be subject to a tax preparer penalty due to a tax position or irregularity on your return, you agree to either adequately disclose that position on your return or change the position to a legal one that we confirm would not subject us to penalty.

If you choose not to change your position or adequately disclose the tax position so as to eliminate our exposure to tax preparer penalties, we, at our sole discretion and at any time, may withdraw from the engagement without completing your tax returns, and you will be charged for any and all work we did on your behalf.

Such withdrawal will complete our engagement, and you will be obliged to compensate us for all time expended and to reimburse us for all out-of-pocket expenses incurred through the date of our withdrawal.

The Affordable Care Act (ACA) has added various new health insurance mandates, penalties and credits. You acknowledge and Mid-America Tax agrees that we will rely solely on information provided by you for the purpose of preparing your tax returns listed above and have provided no advice regarding your eligibility for any credits, estimates of any payments or estimates of any penalties under the ACA.

Confidentiality

All information you provide to us in connection with this engagement will be maintained by us on a strictly confidential basis. In the event we receive a subpoena or summons requesting that we produce documents from this engagement or testify about the engagement we will notify you prior to responding to it if we are legally permitted to do so. You may, within the time permitted by our firm to respond, initiate such legal action as you deem appropriate to protect information from discovery. If you take no action within the time permitted for us to respond or if your action does not result in a judicial order protecting its confidentiality, we may construe your inaction or failure as consent to comply with the request. Time incurred in connection with subpoenas, and/or other related legal matters involving you, and/or your account(s), will be billed at our normal hourly billing rates.

Internet Communication

In the interest of facilitating our services to you, we may communicate by facsimile transmission or send electronic mail over the internet. This often involves sending data, documents and other information, including sensitive tax and financial information. Such communications may include information that is confidential to you. Our firm employs measures in the use of facsimile machines and computer technology designed to maintain data security. While we will use reasonable efforts to keep such communications secure in accordance with our obligations under applicable laws and professional standards, you recognize and accept that we have no control over the unauthorized interception of these communications once they have been sent and consent to our use of these electronic devices during this engagement. You should ensure that your email server and the information stored on your system are secure. We are not responsible for any transmission problems or for the failure of you or any authorized recipient of the information to receive files.

You are solely responsible for (i) notifying the firm of the failure to receive files containing your information so that we may provide a copy in an alternate form; (ii) securing your email server and restricting access to your email in order to maintain confidentiality of the information transmitted; (iii) storing the electronic files containing the information; and (iv) acquiring and maintaining the software needed to open and access the files containing the information.

OUR FEES and LIMITATIONS

Our fee for services will be based upon the complexity of the return(s) and the extent of the tax forms required for us to properly file your tax return(s). If a federal, state, or qualified dependent return is requested, but actual preparation determines that there is no filing requirement, we will waive our fee for the no-filing determination. We do reserve the right to charge based on our standard charges if there is extensive research required to make the "no filing" determination. **Invoices are due and payable upon presentation. To the extent permitted by state law, an interest charge of 20% be added to all accounts not paid within fifteen (15) days from the date the bill is sent to client.** Client agrees they are responsible for any and all costs incurred related to collecting our fees from you, to include, but not limited to: Cost of collections, cost to file suit in court; attorney fees, etc.

Approximated Fee Ranges based on prior year returns: Your returns could cost higher than the average, or high end.

***1040 Federal and one State Individual Tax Returns. Add \$65 for each additional state: \$150 – \$600 (Average \$370).

***Small Business (Schedule C and related forms) add to 1040 costs: \$100 – \$400 (Average \$210).

***Rental Property (Schedule E and related forms) add to 1040 costs: \$300 – \$1,200 (Average \$450).

***C-Corp, S-Corp, Partnerships, & Estates: \$300 – \$1,250 (Average \$650).

You agree that our firm's liability for any and all claims, damages, losses and costs of any nature arising from this engagement is limited to the total amount of fees paid by you to our firm for the services.

We will return your original records to you at the end of this engagement, after you pay in full for services we rendered.

You should securely store these records, along with all supporting documents, as these items may later be needed to prove accuracy and completeness of a return.

After you engage Mid-America Tax to prepare your tax returns, if at any time you notify us in writing to stop working on your tax returns, you agree to pay us for any and all work that we did on your behalf, and at your request.

If you have not elected to e-file your returns, or for another reason are not allowed to e-file, you will be solely responsible to file the returns with the appropriate taxing authorities.

To confirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign where indicated and submit them to our office. Your tax return(s) cannot be prepared until this engagement letter is signed and we receive it in our office.

Sincerely,

Stephen Kenniston
President – Mid-America Tax

Either spouse may complete and submit this engagement letter on behalf of both spouses and represents that they have authority to bind both spouses for purposes of this engagement.

My typed name takes place of my signature. By signing below, I accept the terms of this agreement.

Taxpayer's Signature

Date Signed

Click blue cell then, Drop-Down to Right

Spouse's Signature