

## Tax Preparation Service Engagement Letter – Please Read and Sign

We appreciate the opportunity to work and advise you regarding your income tax return. To ensure a complete understanding between us, this letter clarifies the nature and limitations of the tax services we will provide.

We will prepare your federal and state income tax returns from information that you furnish to us. You represent that the information you supply to us is accurate and complete to the best of your knowledge. We will not audit or verify the information you give us; however, we may ask for additional clarification of some information.

**You have the final responsibility of reviewing your income tax returns before they are filed.** Carefully review your returns before you approve them. Check spelling of names, Social Security Numbers, addresses, etc. Once they are filed, changes cannot be made without amending the return. You will receive either a printed and/or pdf copy of your completed returns. Keep them in a secure place. Additional copies for years prior to the current tax year (2025) will incur a \$25.00 fee.

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations or other irregularities, should any exist. We will, however, render such accounting and bookkeeping assistance as we find necessary for preparation of your income tax returns.

As you know, your returns are subject to examination by the taxing authorities. In the event of an audit, you may be requested to produce documents, records or other evidence to substantiate the items of income and deduction shown on your tax returns. If an examination occurs, we will represent you if you so desire. However, these additional services are **not** included in our fee for preparation of your returns.

We will use our judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible. If, during our work, we discover information that affects your prior year tax returns, we will make you aware of the facts. However, we cannot be responsible for identifying all items that may affect prior year returns. If you become aware of such information during the year, please contact us to discuss the best resolution of the issue.

Here's how to get your tax information to us:

- 1) Bring your information to our office. If an appointment is needed, call to set a time. **(919-859-1100)**
- 2) Send us a fax, day or night. **(919-859-1153)**
- 3) Email your information and attachments to [miriam@marccpa.com](mailto:miriam@marccpa.com)
- 4) Mail your documents to: 523 Keisler Drive, Ste 201, Cary, NC 27518

If you wish to meet with me to discuss your particular tax situation, please call for an appointment.

**\*\*Please note, no appointments will be available from March 4-16 nor April 1-15 due to tax filing deadlines.\*\***

**Payment is due when the tax returns are picked up, mailed or emailed to you.** Our fee for these services will be based on the amount of time required along with the type and number of forms needed to prepare your tax returns.

We appreciate this opportunity to serve you. If you have any questions or need additional information, please do not hesitate to contact us.

Thank You.

W. MARC GILFILLAN, CPA

Accepted by:

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Signature

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Date