

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

We appreciate the opportunity of working with you and advising you regarding your income tax. To insure 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 for the income tax returns. You should review them carefully before you sign them. You will receive a copy of your completed returns. Keep it in a secure place. There will be a fee for additional copies.

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 the 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 judgement 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. Please call before coming to ensure someone will be there when you plan to come (**919-859-1100**); 2) Send us a fax (small amounts please), day or night at **919-859-1153**; 3) Send an email with information or attachments to me at [Marc@MarcCPA.com](mailto:Marc@MarcCPA.com); or 4) Mail in your documents. If you wish to meet with me to discuss your particular tax situation, please call for an appointment. Appointment times are very limited between March 5<sup>th</sup> and 15<sup>th</sup> and April 1<sup>st</sup> to April 15<sup>th</sup>. However, we would love to meet with you at some other time during the year to discuss tax strategies for you.

**Payment is due when the tax returns are picked up.** Our fee for these services will be based on the amount of time required and the type and number of forms needed to prepare your tax returns. We do accept major credit cards. Remember that you might earn \$100 G bucks by referring a new client to us!

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

Thank You.  
W. Marc Gilfillan, CPA

Accepted by:

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sign

date