

Client Engagement Letter

Please sign on below and return with the rest of your tax information

This letter confirms the arrangements for our tax services. We will prepare the following:

2021 Federal income tax return

2021 State income tax return for: _____

Other states, etc.:

We will prepare these returns from information you furnish us. We may ask for clarification of some items, but we will not audit or otherwise verify the data you submit. To better serve you a “Client Data Sheet” is attached to help you gather the information required for a complete return. Completing this data sheet in its entirety will help you avoid overlooking important information and contribute to efficient preparation of your return(s).

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, canceled checks, and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the tax returns and, therefore, you should review them carefully before you sign them. Our services will be concluded by the delivery to you of the returns specified above.

The law provides various penalties that may be imposed when taxpayers understate their tax liability, file late, or pay late.

You agree that in the event your return cannot be completed by the due date, it may become necessary for us to apply to extend the due date. Applying for an extension of time to file may extend the time available for a taxing authority to undertake an audit of your return. **Additionally, failure to pay by the original due date may result in penalties and interest.**

All fees associated with the preparation of your tax returns are due at the completion and/or delivery of your returns. Any additional charges will be outlined before start.

If the above fairly sets forth your understanding of our agreement, please sign this letter and return it to us when you bring in your information. We are pleased to have you as a client and look forward to a long and mutually satisfying relationship.

Sincerely,

Approved:

Signature	Date
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Signature	Date
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Printed name(s)

Please return with the rest of your tax information

Your return copy will be provided via email if we have your email address(es) on file. If you DO NOT want your copies electronically or also want a paper copy, please check the appropriate box(es).

I do not want to receive my return via email (paper copy instead)

I also want a paper tax return copy in addition to an electronic copy