

Date: _____ Client Name: _____
Best Contact Number(s): _____
Email: _____

This letter is to inform you, the Taxpayer (our Client), of the services we will provide you, and the responsibilities you have for preparation of your tax return.

Tax Return Preparation

- We will prepare your 2017 Federal and State tax returns based on information you provide. Services for preparation of your return do not include auditing or verification of information provided by you.
- 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.
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
- **All invoices are due and payable upon presentation. We reserve the right to request a retainer for certain engagements.**
- Preparation fees do cover limited “general questions” during the year that we can answer quickly; however, questions requiring research or tax planning will be covered under a separate engagement.
- If there are errors on the tax return resulting from incorrect information provided by you, it is your responsibility to pay the additional tax, along with any interest and penalties charged by the taxing authorities. If the errors are made by Tax Preparer we will review and may choose to reimburse you the penalty charged. However, you agree to assist Tax Preparer in all efforts to have penalty abated by Taxing Authorities, should such penalty be charged to you as a result of the Tax Preparer errors.
- The engagement to prepare your 2017 tax returns terminates upon delivery of your completed returns and original documents to you. Please store your supporting documents and copies of your tax returns in a secure place for at least seven years.

Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will 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.
- You must review the return carefully before signing to make sure the information is correct. It is ultimately your responsibility for the accuracy of your tax return.
- Fees must be paid before your tax return is delivered to you or filed for you. **If you terminate this engagement before completion, you agree to pay a fee for work completed.** If there are changes for additional income or deductions that you discover after we have completed the return, we reserve the right to charge an additional fee for our time and expenses.

Privacy Policy

It has always been our policy to keep all information that we collect from you confidential from all sources. We restrict access to all nonpublic personal information about you to members of our firm who need to know that information to provide services to you. We do collect nonpublic personal information about you from the following sources:

- 1) Information we receive from you on application, worksheets and other forms,
- 2) Information about your transactions with us, our affiliates or others, and
- 3) Information we receive from outside agencies such as banks and brokerage houses.

We do not disclose any nonpublic information about our customers or former customers to anyone, except as required by law. We maintain physical, electronic and procedural safeguards that comply with federal regulations to guard your nonpublic personal information.

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 must sign.

- You should keep a copy of your tax return and any related tax documents. You may be assessed a fee if you request a copy in the future.

Taxpayer

Spouse