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## Engagement Letter for Tax Return Preparation

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This letter is to inform you, the taxpayer, 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 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.
- We maintain physical, electronic, and procedural safeguards that protect your personal information from unauthorized access. You recognize and accept we are not responsible for unauthorized interception of our data, including emails.
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
- Preparation fees do cover limited assistance and consultation during the year.
- The engagement to prepare your tax returns terminates upon delivery of your completed returns and original documents to you.
- We stand behind our work. If we make an error in preparing your return, we will pay any penalties relating to that error. You are responsible for any tax due.

### *Taxpayer Responsibilities*

- You must review the return carefully before signing to make sure the information is correct. You have final responsibility for the information on your tax return.
- 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. This includes notifying us of any authority over foreign bank accounts.
- You affirm that all expenses or other deduction amounts, including dependents, are accurate and that you have all required supporting written records. In some cases, we may 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, state or local tax authority.
- If you receive a notice from a taxing authority relating to tax returns we have prepared for you, you must notify us promptly. We can provide guidance to resolve any issues.
- 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.
- 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.

**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.

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Taxpayer

Spouse

Date