



Engagement Letter  
Individual Income Tax Returns

Dear Client:

Thank you for the privilege of allowing us to provide you with year-round tax services. We are committed to providing you the highest quality of tax preparation and excellent service. This engagement letter expresses the terms and conditions under which we will provide you with tax services and it outlines responsibilities for each of us.

We will prepare your federal income tax return (and any state returns you may require) from information you provide. In preparing your return(s), we will not audit or verify the data you submit (although we may ask for clarification). We will use our judgment in resolving questions where the tax law is unclear or where there may be different interpretations of the law. We will resolve such questions in your favor whenever possible.

We will furnish a questionnaire/organizer to help you gather the necessary information. You will provide us with all the information required to prepare your return(s) representing that the information is accurate and complete to the best of your knowledge. You also represent that the income and expense items you claim on your return(s) are substantiated by proper records and receipts. **You are ultimately responsible for the accuracy of your return(s) and should review all returns carefully before signing.** Mailing your tax return is your responsibility. We provide pre-addressed envelopes, but no postage is included.

Your returns, of course, are subject to review by the taxing authorities. However, just because you receive a letter from the IRS or your return is selected for audit does not mean there is a problem. In your interest, it is advisable to contact this office immediately upon receiving correspondence from the Internal Revenue Service. We will be available to assist you and/or represent you at our current rate of \$150.00 an hour.

If there is an error on the return which results from incorrect information supplied by you, you are responsible for the payment of any additional taxes which would have been properly due on the original return(s), and any interest and penalties charged by the IRS. If we have made an error, other than an error caused by incorrect information you supplied, we will be responsible for payment of penalties. We will not pay interest or any additional tax due since the tax would have been payable had the return been correctly prepared, and you have had use of such monies in the interim.

**Fees** for individual income tax returns will be computed according to our current fee schedule, plus any out of pocket expenses. Organizing records and compiling figures for entry on the tax return will be billed at our consulting rate of \$150.00 an hour. Such charges are billed in addition to the fee schedule. **Full payment of your tax preparation fee is required before we will electronically file your return or release the paper return to you.** We reserve the right to ask for retainer fees to be paid in advance of work done from new clients and any client with whom we have experienced payment problems. Rates are subject to change and are usually updated in July of each year. 1 copy of your tax return will be provided to you for your files. Additional copies at the time your return is printed are \$10.00 each. Copies of your return at any other time are \$25.00 each.

**Extension requests:** Please contact us if you would like to request an extension of time to file your return. This may be necessary if you do not submit all of your tax information to us by April 1. Even if you file an extension request, you may be assessed penalties and interest if you have paid less than 100% of your current tax liability by April 15. We do not automatically file extensions.

This engagement letter will apply for all future years unless the agreement is terminated or amended in writing by you or the preparer. Please sign this letter and bring it with you to your tax appointment. A copy will be returned for your records.

**Privacy Statement:** We maintain a file of tax returns as required by law which we have prepared and/or electronically filed. We do not share your information with anyone else, except as required by law, without your written permission.

\_\_\_\_\_  
Taxpayer Signature

\_\_\_\_\_  
Spouse Signature

\_\_\_\_\_  
Date