

## Engagement Letter

Thank you for choosing Tax Center Plus to assist you with your \_\_\_\_\_ taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your federal and state income tax returns. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. An Organizer is enclosed to help you collect the data required for your return. The Organizer will help you avoid overlooking important information. By using it, you will contribute to the efficient preparation of your returns and help minimize the cost of our services.

We will perform accounting services only as needed to prepare your tax returns. Accounting services will be billed in addition to your tax preparation work. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will inform you of any material errors, fraud, or other illegal acts we discover. You are ultimately responsible for the accuracy of your return(s) and should review all returns carefully before signing.

The law imposes penalties when taxpayers underestimate their tax liability. Be very diligent about including all your sources of income. Please call us if you have concerns about such penalties.

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 returns(s) and any interest and penalties charged by the IRS. If we have made an error, other an error caused by incorrect information you supplied, we will be responsible for payment of penalties. We will not pay any additional tax due since that tax would have been payable had the tax return been correctly prepared. We do not pay interest because you have had use of the monies in the interim.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

**FEES** for individual 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 (accounting services) will be billed at \$150.00 per hour. Such charges are in addition to the tax return preparation fee schedule. **Full payment of your tax preparation fee and any additional charges 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 from any client with whom we have experienced payment problems.** Rates are subject to change and are usually updated annually. One copy of your tax return will be provided to you for your files. Additional copies at the time your return is printed are \$25.00 each. Copies of your return at any other time are \$50.00 each.

We will return your original records to you at the end of this engagement. Store these records, along with all supporting documents, canceled checks, etc., in a secure location in case these items are needed later to prove accuracy and completeness of a return. We retain copies of your records and our work papers for your engagement for three years, after which these documents will be destroyed.

Our engagement to prepare your tax returns will conclude with the delivery of the completed returns to you (if paper-filing) or your signature and our subsequent submittal of your tax return (if e-filing). If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them.

**Please note: Our responding to any and all IRS or State letters subsequent to filing your tax return is not included in the tax preparation fee and will be billed at current rates at the time of service, unless an exception applies (see above).**

**Check out our Tax Year – IRS Response Agreement available at [www.taxcenterplus.com](http://www.taxcenterplus.com) under Worksheets.**

**Extension Requests:** Please contact us if you would like 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 interested if you have paid less than 100% of your current tax liability by the filing deadline. Extensions are granted for filing your return, not for paying your tax. **We do not automatically file extensions.**

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, sign the enclosed copy of this letter in the space indicated and return it to us with your tax information. If you are emailing your tax information, please use secure email. You may email us securely by finding an email from us with the secure link or by going to [www.taxcenterplus.com](http://www.taxcenterplus.com) under the Contact Us tab. Please be responsible for your information and do not take chances. You are responsible for any data that may be compromised if you do not send it to us in a secure manner.

We appreciate your confidence in us. Please call us at (509) 736-2400 if you have any questions.

Sincerely,

Barbara Culver, EA  
Tax Center Plus

(Both spouses must sign for preparation of joint returns).

Accepted by:

_____	_____	Date _____
Taxpayer	Spouse	