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Tax Service

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**General Engagement Letter for Income Tax Return
Preparation**

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 2020 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 an audit or examination of your books or records. In the event your return is audited, you will be responsible for verifying the items provided.
- The tax 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.
- Preparation fees do cover LIMITED assistance and consultation during the year.
- The engagement to prepare your 2020 tax return terminates upon the 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. You will be assessed a fee if you request a copy in the future.

Taxpayer Responsibilities

- You agree to provide us with 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 carefully before signing your tax return to make sure the information is correct.

Fees

- Fees must be paid before your tax return is delivered to you or filed on your behalf.
- If you terminate this engagement before completion, you agree to pay a fee for work completed.
- A retainer is required for preparation of unfiled previous years' returns.
- Our firm reserves the right to bill for time spent and fees incurred collecting, recovering, or protecting our fees for services performed.

Signatures. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities and that you understand our policies and responsibilities in preparing your tax return as explained above. For a joint return, both taxpayers must sign.

Taxpayer

Date

Spouse

Date

Privacy Policy

- The nature of our work requires us to collect certain nonpublic personal information about you from various sources. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We also may review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.
- Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to any third party without your express permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access. Please contact us with any questions regarding our privacy policy.