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Engagement Letter for tax year _____

This must be signed before we begin our work and may be brought to your appointment this letter confirms our understanding of the terms and objectives of our tax services engagement and clarifies the nature and limitations of the services to be provided. It is your responsibility to provide us with all the information necessary for the preparation of complete and accurate income tax returns. Completing (or at the very least reviewing) the questionnaires and organizers that we provide you, will assist us greatly. We are not required to audit or verify the information that you provided. We will ask for clarification when we feel it is necessary and discuss the stringent laws regarding certain items.

We are governed by strict licensing laws regarding ethics and confidentiality. Communications regarding the preparation of your tax return will be kept strictly confidential. However, such communications are not protected by privilege and we can be legally compelled to disclose them. Ethically we are required to include all the information given to us on your tax return. We collect nonpublic information about you in order to accurately prepare your tax return. Most of that information is collected directly from you some may come from third-party sources with your permission. We do not disclose any nonpublic personal information about you to anyone, unless we are required to do so by law, or you give us express written permission to share such information. We restrict access to nonpublic personal information about you to those employees who need to know that information to provide products or services to you. We maintain physical and electronic and procedural safeguards that comply with federal standards to guard your nonpublic personal information.

We charge by the forms needed to complete your tax return. If we need to spend additional time such as researching complex tax law, sorting documents, or calculating basis, then there will be additional fees. If we need to meet with, talk to, or write any taxing authority to clarify or discuss certain items on your return then there will be additional charges as appropriate. The fee for your tax preparation is due in full when you pick up your return. We will be very flexible with those clients who have an excellent payment history, and we will gladly discuss payment arrangements ahead of time. We reserve the right to require advanced payments and pursue collection activities.

You, as our client, are very important to us we always endeavor to prepare your returns as accurately as possible to ensure that you never pay more tax than is required. All of the preparers attend at least 30 hours of continuing education each year. Our office follows procedures to make sure that our work is checked for accuracy and quality. Human error is always a possibility. If we do make an error we will resolve it as quickly as possible. We will not pay additional tax that might be due because of a correction. We will pay penalties if appropriate. We limit any further liability on our part to the amount of fees paid.

Signature _____ Date _____