



Tax Engagement

We appreciate the opportunity to work with you. To minimize the possibility of a misunderstanding between us, this letter sets forth pertinent information about the services we will provide for you. This letter also outlines some of your responsibilities.

Information. It is your responsibility to provide us with true, correct and complete information regarding your income, expenses and/or itemized deductions. Based on the information you furnish to us, we will prepare your 2014 Federal & State 1040 Income Tax Return with applicable schedules. **We will not audit or otherwise verify** the information you give us, although we may ask you clarify some of it. We are not responsible for disallowed deductions, or the inclusion of additional unreported income or any resulting taxes, penalties or interest.

Pricing. Our prices are based on a “per-form” schedule. Any additional sorting of records or adding of receipts, will be billed separately. We bill for reimbursements of any out-of-pocket expenses (copying cost & computer processing fees). You understand that you will be charged an additional fee if we are asked to assist or represent you in a tax examination **OR INQUIRY**.

Payments. Invoices are due and payable upon completion of your return. No tax return will be e-filed to the IRS or State, or released to you, until payment has been received. Additional services will not be performed until the bill for these services are paid in full.

Extensions. If your tax return information is not received by **April 1, 2015** our office may need to place your return on extension. If this should occur, we will contact you. **This is not an extension of time to pay.** **Any amount owed is due on April 15th. The amount due should be sent along with the extension request.**

Retention. You need to maintain all necessary tax records supporting your returns, including but not limited to receipts, cancelled checks for deductible items, receipts for charitable contributions, and log books, to only name a few. These must be retained for a minimum of **3 years** from the filing date of your return. If you have additional questions please call. Otherwise, we are not responsible for the disallowance of doubtful deductions or inadequately supported documentation, nor for resulting tax penalties and interest.

Audits. Your return may be selected for examination by a taxing authority. Any proposed adjustments by the examining agent are subject to certain rights of appeal. If an audit occurs, we can represent you, however there will be an additional fee (unless you purchased the Prepaid Audit Defense) for time and expenses incurred.

Once you have read, understood and accepted the conditions of this letter, please print your name, sign and date. We will not be preparing any return(s) until we have received a signed copy of this letter.

Printed Name: _____

Signature: _____ Date: _____