

Tax Preparation Engagement Letter

Thank you for choosing our firm to prepare your 2023 income tax returns. This letter confirms the services we will provide and your responsibilities in regard to the preparation of your 2023 Income Tax Return.

We will prepare your federal and state returns based on information you provide. Although our work will not include procedures to discover irregularities or inaccuracies in the tax data you provide, we may ask for clarification of certain information, or additional information, so that we can prepare accurate and complete returns for you.

It is your responsibility to provide all necessary information related to income and deductions, and to respond to our inquiries in a timely manner so that we are able to accurately complete your returns by the appropriate due dates. It is your responsibility to ensure that all income is reported on your return. You cannot rely on us to know when income is missing.

We will return your original records to you at the end of this engagement. You are responsible for maintaining appropriate records, such as official tax documents you receive, receipts and substantiation for your deductions, and purchase and sales information for assets. Although we often make copies of relevant documents used in the preparation of your return, we have no requirement to do so and offer no assurance that we will have the documents in our files. You will receive one copy of your tax return in either paper or digital format. It is your responsibility to retain this copy for your future needs. We will destroy all documents in our possession after three years.

It is your responsibility to review your returns before they are filed to determine that all income has been correctly reported and that you have substantiation for your deductions. Filing your returns by the due dates is your responsibility. We will not efile your tax return until the signature authorization has been received in our office.

Information you provide will be kept confidential. I restrict access to your information and maintain physical, electronic and procedural safeguards to protect your information.

If your returns are later selected for review or audit by taxing authorities, we will be glad to assist or represent you if you desire. Our fees for preparing your returns do not include time that might be necessary to assist you during a taxing authority review.

Our fees for preparation of your returns are based upon our standard billing rates plus out-of-pocket expenses. Our invoices are due and payable upon presentation. Your return will not be efiled until payment is received. Our fee structure is a forms-based pricing for tax preparation plus an hourly rate for data compilation needed to complete various forms in the return. Income tax return preparation is based on our published forms pricing schedule, which may be adjusted based on complexity.

Tax return preparation prices do not include accounting or bookkeeping services. Tax preparation fees include reasonable email and telephone contact throughout the year. Additional fees will be charged for in-office consultations, extended email and telephone contact, calculations to forecast income or tax liability, tax agency correspondence, and audit representation at hourly rates. Our current rate schedule can be viewed at www.abjtax.com.

I will perform accounting services only as needed to prepare your tax returns. My 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. I will, of course inform you of any material errors, fraud, or other illegal acts I discover.

Our engagement to prepare you 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 efililing). If I am not able to efile your returns, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them.

If this letter accurately summarizes your understanding of our agreement relating to the preparation of your tax returns, please sign in the space indicated and return it to us. Thank you again for choosing our firm to prepare your tax return. We appreciate your business.

Sincerely,
Amy Jack, EA

Accepted by:

Taxpayer:

Spouse:

Sign: _____

Sign: _____

Print: _____

Print: _____

Date: _____

Date: _____