



ABJ & Associates Inc
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TAX PREPARATION ENGAGEMENT LETTER

Thank you for selecting our firm to prepare your 2024 income tax returns. This letter outlines the services we will provide and your responsibilities in relation to the preparation of your 2024 Income Tax Return.

Scope of Services:

We will prepare your federal and state tax returns based on the information you provide. While our work will not include procedures to discover irregularities or inaccuracies in the data, we may request clarification or additional information to ensure your returns are accurate and complete.

Your Responsibilities:

It is your responsibility to provide all necessary information related to your income and deductions and to respond to our inquiries promptly. This will allow us to complete your returns accurately and by the appropriate due dates. Please ensure that all income is reported on your return, as we cannot independently verify missing income.

At the conclusion of this engagement, we will return your original documents. You are responsible for maintaining appropriate records, such as official tax documents, receipts, and substantiation for deductions, as well as purchase and sales information for assets. While we may make copies of relevant documents, we are under no obligation to retain them and cannot guarantee that we will have them on file. You will receive one copy of your tax return, either in paper or digital format, and it is your responsibility to retain this copy for future reference. All documents in our possession will be destroyed after three years.

Portal:

Our TaxDome portal is designed to make tax preparation as convenient and efficient as possible. Through the portal, you can securely upload and access your documents, communicate directly with our team, and electronically review and sign your tax returns. By using TaxDome, you'll enjoy enhanced security, real-time updates, and a simplified process that saves you time and effort. Simply provide us with your email address, and we'll get you set up right away.

Timing:

To ensure the timely preparation of your tax returns, we require that you provide all necessary documentation and information no later than March 15th. If your paperwork is submitted after this date, we cannot guarantee the completion of your returns by the filing deadline.

If we determine that an extension of time is necessary to avoid late filing penalties, this signed engagement letter authorizes us to file an extension on your behalf. Please note that an extension grants additional time to file your return but does not extend the time to pay any taxes owed. Therefore, it is important to provide us with your information as soon as possible to facilitate accurate tax planning and minimize any potential interest or penalties.

Review and Filing:

You are responsible for reviewing your returns before they are filed to ensure that all income is correctly reported and that you have substantiation for your deductions. Filing your returns by the due dates is also your responsibility. Please note that we will not e-file your return until we have received your signed authorization.

Confidentiality:

We are committed to maintaining the confidentiality of your information. We restrict access to your data and implement physical, electronic, and procedural safeguards to protect it.

Post-Filing Assistance:

If your returns are selected for review or audit by taxing authorities, we will be available to assist or represent you if desired. Please note that our fees for preparing your returns do not include time for assistance during a review or audit.

Fees and Billing:

Our fees for preparing your returns are based on our standard billing rates plus any out-of-pocket expenses. Payment is due upon presentation of our invoice, and your return will not be e-filed until payment is received. Our fee structure is based on a forms-based pricing schedule for tax preparation, plus an hourly rate for any data compilation needed to complete the forms. The pricing schedule may be adjusted based on the complexity of your return.

Tax return preparation fees do not include accounting or bookkeeping services. However, they do cover reasonable email and telephone contact throughout the year. Additional fees will apply for in-office consultations, extended email and telephone communications, income or tax liability forecasting, tax agency correspondence, and audit representation. Our current rate schedule is available at www.abjtax.com.

Limitations of Engagement:

We will perform only the accounting services necessary to prepare your tax returns. Our work will not include procedures to identify defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, although we will inform you of any such issues that we may discover during the course of our work.

Our engagement to prepare your tax returns will conclude with the delivery of the completed returns to you (if filing by paper) or your signature and our subsequent submission of your tax return (if filing electronically). If we are unable to e-file your returns, you will be solely responsible for filing them with the appropriate taxing authorities. Please review all tax return documents carefully before signing them.

If this letter accurately reflects your understanding of our agreement regarding the preparation of your tax returns, please sign in the space provided and return it to us. Thank you once 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: _____