



## Engagement Letter for 2023 Tax Preparation Services

You have requested our firm's assistance with preparation and filing of your 2023 Federal and State income tax returns. In addition to preparing your returns for filing, we will supply you with a copy of the returns for your records.

We are required by law to file most income tax returns electronically. If your return cannot be filed electronically, or you request a waiver from the electronic filing requirement, we may require your approval and signature on a waiver document. In this case we will supply you with paper copies and envelopes for sending to the appropriate Federal and State agencies.

Our fee for preparation and filing services including limited assistance and consultation during the year, is \$200 per hour. Unless other arrangements have been made in advance, we require full payment of preparation fees before we efile your returns. We prefer payment by check however with an added processing fee we offer a bank-to-bank transfer available on an emailed QuickBooks invoice (1% fee), a credit card payment available on an emailed QuickBooks invoice (2.99% fee), a credit card payment in person through a card reader (2.5%), and credit card payment over the phone (3.5%).

We will prepare your returns based on information you provide. You agree that you will provide all necessary documents and answer all questions truthfully and fully so I can accurately prepare your returns. Preparation of your tax returns does not imply any verification or other assurances related to the information you provide, and we will not perform any auditing functions related to this engagement. You acknowledge that it is your responsibility to provide all documentation and verification of items on your returns in the case of an audit or other inquiry from a government agency. Note that some items such as auto expenses, travel expenses, and certain charitable contributions require contemporaneous written records to allow a deduction. You must review returns carefully before signing to make sure the information is correct.

Information you provide will be kept confidential. However, our discussions are not protected by any form of attorney-client privilege. I will advise you to consult with an attorney at any time I feel it may be appropriate.

This agreement covers only the preparation of your tax return and does not apply to services related to an audit of the return by a government agency, additional correspondence with a government agency, or other services that may be required after filing of your returns. If additional services are required, a separate agreement will be executed.

Your signature below indicates that you have read, understand and accept your obligations and responsibilities and that you understand our responsibilities in preparing your tax returns as explained above. For a joint return, both taxpayers must sign.

X \_\_\_\_\_ X \_\_\_\_\_ X \_\_\_\_\_  
Taxpayer Signature                      Spouse Signature (if applicable)                      Date