

Engagement Letter: Income Tax Preparation Services

This letter is to confirm and specify the terms of our engagement and to clarify the nature and extent of the services to be provided. Your signature(s) below confirms your agreement with the following arrangements:

- I will prepare your federal, state, and local income tax returns based on information that you provide to me. Sales, payroll, personal property, occupancy, arts, or any other tax returns are not included in this engagement; unless otherwise agreed to in writing or by email, you will file any such non-income tax returns on your own.
- I will charge a fee for my services, based on the time I spend working on your returns. I will not sign and/or file your tax returns until payment is received. Additional charges to correct complications in the filing process (e.g. identity theft issues or other e-file rejections) may apply. If this engagement is canceled before the returns are completed, I will charge a fee based on the number of hours of service provided to that point. My hourly fee may change from time to time; I will publish current information on my website, www.schickcpa.com. If payment is not received on time (generally within 60 days), a late fee may be charged, and your account may be sent to a collections agency.
- It is your responsibility to provide me with accurate and complete financial/accounting records. I will not audit or otherwise verify the information that you provide to me, nor will I ask you to “prove” any of the information. My work in connection with the preparation of your income tax returns does not include any procedures designed or intended to discover errors, falsifications, and/or irregularities, should any exist. If, in the normal course of my work, I notice any information that appears to be incomplete or incorrect, I will ask you to provide clarification or additional information as necessary.
- I may ask questions, or provide you with questionnaires and worksheets, to guide you in gathering information relevant to your tax returns. These questions and materials should not be seen as exhaustive; it is unreasonable for me to inquire about the applicability of all tax regulations to your individual financial situation. It is ultimately your responsibility to provide any and all information (whether or not specifically asked for) necessary for me to prepare complete and accurate returns on your behalf. In particular, you must inform me of all income from all sources that you have received during the tax year, even if you do not believe that the income is taxable.
- I will provide you with access to electronic copies of your tax returns or tax information via email using a link to a document stored in “cloud” storage (e.g. Dropbox). For security purposes, these links will generally expire within 7-10 days. You may request other methods of delivery, if you are not comfortable with this arrangement. I will not provide paper copies of your tax returns to you unless you specifically request them; an additional charge of at least \$10 will apply, to cover time and expenses.
- You will have the opportunity to review your tax returns for accuracy and completeness before they are filed; your signature on the returns (or on the e-file authorization forms) indicates that you have reviewed the returns for accuracy and completeness and that you consent to their being filed. You are responsible for mailing any tax payments, or tax returns that are to be filed on paper (not electronically), in a timely fashion.
- I will retain scanned copies of any relevant documents that you provide to me for a period of at least 3 years. These electronic files, and electronic copies of your completed tax returns and other tax information, will be stored on my local computer network and/or in encrypted “cloud” storage. You are responsible for retaining all original records, receipts, and other documents and data that form the basis of the income and deductions declared on your returns, as these may be necessary to prove the accuracy and completeness of your returns to government authorities.
- Your returns may be selected for review or examination by taxing authorities. I will provide up to 2 hours of my own service free of charge to help you understand the nature of the review or examination, if the tax returns selected were prepared by me. Any additional work you request will be billed to you at standard hourly rates; such services are not included in your tax preparation fee. You are responsible for any charges billed for time and expenses associated with examination preparation and representation, whether the services are provided by myself or another professional.

This agreement will remain in effect for future tax years, unless amended in writing or replaced with a new written agreement. The engagement may be terminated by either party in the event of dishonesty (e.g. providing false financial information) or non-cooperation (e.g. refusal to provide requested information in a timely fashion).

Sincerely,
Matt Schick , CPA

(Print name)

(Signature)

(Date)

(Spouse - Print name)

(Signature)

(Date)