

TAXPAYER NAME: \_\_\_\_\_  
TAXPAYER PHONE: \_\_\_\_\_  
TAXPAYER EMAIL: \_\_\_\_\_  
ADDRESS: \_\_\_\_\_

SPOUSE NAME: \_\_\_\_\_  
SPOUSE PHONE: \_\_\_\_\_  
SPOUSE EMAIL: \_\_\_\_\_  
CITY/ST/ZIP: \_\_\_\_\_

## ENGAGEMENT LETTER

This letter is to confirm and specify the terms of our engagement with you, the taxpayer, and to clarify the nature of the services we, the tax preparers, will provide. Please **initial each section**, sign and date the end of the document and return to J's Tax Service staff prior to your tax appointment.

### TAX PREPARATION, SCHEDULING, AND BILLING POLICIES

\_\_\_\_\_ We will prepare your current and/or past years Federal and State tax returns based on information you provide. This engagement only pertains to the current and past year Federal and State tax returns and does not include any future or additional returns you may be required to file with other taxing authorities, such as Board of Equalization.

\_\_\_\_\_ Services for preparation of your return do not include auditing or verification of information provided by you unless otherwise agreed upon by you and your tax preparer for an additional minimal fee. Our engagement does not include any audit or examination of your books or records. In the event your return is audited, you will be responsible for verifying the items reported on your tax return.

\_\_\_\_\_ Our tax preparation fee does not include bookkeeping. These fees are separate. Fees must be paid before your tax return is filed or delivered to you unless otherwise agreed upon between you and your tax preparer.

\_\_\_\_\_ If you terminate this engagement before completion of the tax return for any reason under your control, you agree to pay a proportionate fee for work completed.

\_\_\_\_\_ Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities. Assistance on preparing for audits and responding to correspondence will require a consultation fee of \$50 per hour, with a one hour minimum. If correspondence received is due to tax preparer error, we will provide assistance at no charge to you.

\_\_\_\_\_ The engagement to prepare your current and past tax returns terminates upon delivery of your completed returns and original documents to you. Store your supporting documents and copies of your tax returns in a secure place for at least seven years. We do not keep original documents such as W2s.

\_\_\_\_\_ Your tax preparation fee includes a PDF copy of your return which can be emailed to you or uploaded to a USB memory device provided by you. Paper hardcopies are available at a fee of \$10 per copy per tax year.

\_\_\_\_\_ Tax preparation fees are different and separate from tax payments. Tax payments are made directly to Federal and State taxing authorities for taxes due. Preparation fees are made directly to your tax preparer for services rendered. We do not automatically withdraw your tax preparation fees from tax refunds.

\_\_\_\_\_ It may be necessary to prepare an extension of time to file your current year tax return when we do not receive your tax information at least 30 days prior to the due date of your return, or when you provide your tax information to us without a scheduled appointment. An extension only allows additional time to file a return. It does not extend the time to pay any taxes that are due.

\_\_\_\_\_ During tax season only current year tax returns will be filed unless otherwise agreed upon between you and your tax preparer. Previous years will be completed after the current tax return deadline. A deposit of \$40 per year is due upon receipt of your previous year(s) tax information.

\_\_\_\_\_ It may be necessary for your preparer to outsource tax preparation to another preparer due to schedules and workload. All preparers are certified to complete your return.

\_\_\_\_\_ Due to preparers' very full schedules, appointments needing to be rescheduled will likely be seen on an extension basis. We do not keep cancellation lists and rescheduled appointments are subject to preparer availability. Appointments cancelled without 48-hour notice or cancelled more than once are subject to a cancellation fee of \$25, added to your tax preparation fee and due prior to filing your return.

\_\_\_\_\_ Payment is due upon completion of your tax return. Tax returns will not be filed until payment has been made in full unless otherwise agreed upon between you and your preparer. If you and your preparer agree to postpone payment, you will be required to pay a \$40 deposit and either leave a post-dated check or complete a Credit Card Authorization Form dated no later than three weeks from the billing date.

\_\_\_\_\_ Unpaid invoices will be charged additional service fees, including a \$5 late fee per month, and are subject to collections after 90 days. There is a \$40 fee for returned payments. We reserve the right to suspend our services or to withdraw from this engagement in the event our invoices are not paid and you will be obligated to reimburse us for all costs through the date of termination.

\_\_\_\_\_ Our maximum liability to you arising for any reason relating to services rendered under this letter shall be limited to the amount of fees you paid for these services. In the event of a claim relating to services under this letter, you will indemnify us from all such claims, liabilities, costs and expenses, except to the extent determined to have resulted from our intentional or deliberate misconduct. You are responsible for reviewing your tax return for errors and omissions prior to submission. Upon completion of your tax return, we will provide you will an e-file authorization form for each taxing authority. Tax returns will not be e-filed without signed authorizations on file.

\_\_\_\_\_ If any dispute arises between or among the parties hereto, the parties agree first to try in good faith to settle the dispute through non-binding mediation. The costs of mediation shall be shared equally by the parties.

**TAXPAYER RESPONSIBILITIES**

\_\_\_\_\_ I agree to provide to my preparer all income and deductible expense information. If I receive additional information after my preparer has begun working on my return, I will contact them immediately to ensure my completed tax return contains all relevant information. I understand that information received after my return has been filed could require me to file an amended tax return at an additional expense, and that amended returns will be done after the current tax return deadline.

\_\_\_\_\_ I affirm that all expenses or other deduction amounts are accurate and that I have all required supporting written records. I understand that in some cases, my preparer may ask to review my documentation, and that I must be able to provide written records of all items included on my tax return if audited by either the IRS or state tax authority.

\_\_\_\_\_ I understand it is my responsibility to review my tax return carefully prior to signing e-file authorization forms to ensure that all information and deductions have been entered correctly. I understand tax returns will not be e-filed without signed authorizations on file.

\_\_\_\_\_ I understand if I have an unpaid balance to J's Tax Service and do not make satisfactory payment arrangements, my account may be placed with external collection agency. I will be responsible for reimbursement of the fee of any collection agency, which may be based on a percentage at a maximum of 35% of the debt, and all costs and expenses, including reasonable attorneys fees incurred during collection efforts. In order for J's Tax Service or their designated external collection agency to service my account and where not prohibited by applicable law, I agree that J's Tax Service and the designated external collection agency are authorized to (i) contact me by telephone at the telephone number(s) I am providing, including wireless telephone numbers, which could result in charges to me, (ii) contact me by sending text messages (message and data rates may apply) or emails, using any email address I provide and (iii) methods of contact may include using pre-recorded/artificial voice message and/or use of an automatic dialing device, as applicable.

**SIGNATURES**

By signing below, you acknowledge 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 the engagement.

\_\_\_\_\_  
TAXPAYER SIGNATURE

\_\_\_\_\_  
DATE

\_\_\_\_\_  
SPOUSE SIGNATURE

\_\_\_\_\_  
DATE