

Tax Engagement

We appreciate the opportunity to work with you. To minimize the possibility of a misunderstanding between us, this letter sets forth pertinent information about the services we will provide for you. This letter also outlines some of your responsibilities.

Information. It is your responsibility to provide us with true, correct and complete information regarding your income, expenses and/or itemized deductions. Based on the information you furnish to us, we will prepare your 2013 Federal & State 1040 Income Tax Return with applicable schedules. **We will not audit or otherwise verify** the information you give us, although we may ask you clarify some of it. We are not responsible for disallowed deductions, or the inclusion of additional unreported income or any resulting taxes, penalties or interest.

Pricing. Our prices are based on a "per-form" schedule.

Payments. If you choose *Direct Deposit*, invoices are due and payable upon completion of your return. No tax return will be e-filed to the IRS or State, or released to you, until payment has been received. Additional services will not be performed until the bill for these services are paid in full.

If you choose to go through *Bank Product*, tax preparation fees can be withheld from the check or direct deposited into your account. This product is not a loan, but it allows our office to print a cashier check for you or have it deposited in your bank account as soon as the refund is received at the bank.

Extensions. If your tax return information is not received by **April 1, 2013** our office will contact you to see if you need to place your return on extension. **This is not an extension of time to pay. Any amount owed is due on April 15th. The amount due should be sent along with the extension request.**

Retention. You need to maintain all necessary tax records supporting your returns, including but not limited to receipts, cancelled checks for deductible items, receipts for charitable contributions, and log books, to only name a few. These must be retained for a minimum of **3 years** from the filing date of your return. If you have additional questions please call. Otherwise, we are not responsible for the disallowance of doubtful deductions or inadequately supported documentation, nor for resulting tax penalties and interest.

Once you have read, understood and accepted the conditions of this letter, please print your name, sign and date. We will not be preparing any return(s) until we have received a signed copy of this letter.

Printed Name: _____

Signature: _____

Date: _____