

AGREEMENT FOR ENGAGEMENT OF INCOME TAX SERVICE



Client Name(s) _____
Tax Year 2022 Tax Type 1040

This agreement is written to confirm your understanding of the terms of our engagement and the nature and extent of the income tax services this office will provide. Please read this carefully, contact us with any questions or concerns, and sign below. Please note for married couples, both spouses must sign.

We will prepare your Federal Income Tax Return for the year specified above. This does not include any preparation of any other tax returns due to any taxing authority, unless specified. We will not verify all of the data you submit; however, we will ask you to clarify or substantiate some of the information. We will be available to assist and guide you in gathering the necessary information by furnishing you with questionnaires and worksheets, and by answering your questions.

We require the questionnaire be completed and this signed agreement to be returned to our office before we will begin work on your tax return. In addition, it is your responsibility to provide us all the information necessary to complete your tax return in a timely manner. You need to retain all documents and records to substantiate the items of income and expenses claimed on your tax return. Since you have the final responsibility for the information on your tax return, we require you to review your return before signing it; we are happy to review it with you to answer any questions you may have.

We will retain our work papers and a copy of your tax return for your engagement for five years. All of your original records will be returned to you with a copy of your tax return. If you should need additional copies of your tax return, we will provide that directly to you for an additional fee. In connection with this engagement, we may communicate with you via email or our portal system and will do our best to adhere to secure measures to keep your information safe and confidential.

Fees for our services are based on the forms needed to complete your tax return, with a minimum 1040 fee of \$450; you may request an estimate before we begin processing your return. Prepared returns will not be released or electronically filed without your signature and full payment of our fees. This fee does not include follow up IRS notices or correspondence. Your return is subject to review by taxing authorities, via mail, phone, or in-person. If such an examination or correspondence occur, we will be able to represent you and/or respond for you at an additional fee.

This agreement also informs you of our privacy policy (our full privacy policy is stated on the back of this agreement). We value your trust and confidence and want to assure you that we keep information about you secure and confidential. We adhere to the highest level of professional ethical standards and obligations to protect the confidentiality of all client information.

Thank you for this opportunity to work with you. By signing below, you are acknowledging that you have read, understand, and accept the conditions of this agreement and our privacy policy.

X Client _____

Date _____

X Client _____

Date _____

PRIVACY POLICY

This Privacy Policy is to help you understand what information we collect about you, the limited times we may share it with others, and what measures we take to protect your privacy.

Federal law mandates that, as our client, we must make you aware of a law protecting the privacy of individuals. Our firm respects and maintains the confidentiality of our clients. In compliance with the law, we inform you that we collect nonpublic, personal information from you on tax preparation worksheets and other documents we use in preparing your tax return.

We do not disclose any nonpublic, personal information about our clients or former clients to anyone, except as necessary for electronically filing your tax return. With federal regulations effective 1/1/2009, we are no longer able to provide any tax return copies or information to any third parties without a signed consent form from you: email and verbal requests are no longer adequate.

Access to nonpublic, personal information is restricted to those professionals necessary for providing accounting and tax service to our clients. We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your nonpublic, personal information.

If you decide to close your account(s) or become an inactive customer, we will adhere to the privacy policies as stated.

Keeping your information confidential and secure is our top priority. Your confidence in us is very important and we want you to know that your personal information is safe. If you have any questions or concerns, please do not hesitate to contact our office.