

Agreement of Services to Be Provided for:

_____ Client Name

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. This letter is contractual in nature and includes all relevant terms governing this engagement. Its terms supersede any prior oral or written representations or commitments by or between the parties.

We will prepare your 2022 1040 federal income tax return and the mutually agreed-upon income tax returns for the states of _____ (collectively, the “returns”). This engagement pertains only to the 2022 tax year, and our responsibilities do not include preparation of any other tax returns. Your returns may be selected for review by one or more taxing authority. In this event, we will be available upon your request to represent you. Any such representation will be the subject of, and governed by, a separate engagement letter.

We will prepare the returns from the information you provide us. It is your responsibility to provide all the information required for the preparation of complete and accurate returns. Questionnaires and worksheets are available upon request to help you gather the necessary information. Your use of such forms will assist us in keeping our fees to a minimum. To the extent we render any accounting and/or bookkeeping assistance, it will be limited to those tasks we deem necessary for preparation of the returns. In the event we and/or you are assessed penalties due to our reliance on incomplete or erroneous information you supplied to us (with or without your knowledge or intent), you will indemnify us and hold us harmless as to those penalties.

We will not audit or otherwise verify the data you submit; however, we may ask for additional clarification of information. Accordingly, our engagement cannot be relied upon to disclose errors, fraud, or other illegal acts that may exist. You are responsible for maintaining adequate records, safeguarding assets, and authorizing transactions, all of which will help assure the preparation of proper returns.

Our fees for this engagement will be based on our standard hourly rates in addition to any related reimbursement expenses and/or service packages. Depending on the engagement, we may require an upfront retainer and/or invoice you monthly for services performed. Payment is due upon receipt. Invoices unpaid 30 days past the billing date may be deemed delinquent and are subject to a late fee of 1% per month. We reserve the right to suspend our services or to withdraw from this engagement in the event that any of our invoices are deemed delinquent. If any collection action is required to collect unpaid balances due us, you are responsible for, but not limited to, the principal amount, collection agency fees, attorney fees, and all court costs plus any other reasonable costs of collection.

You have final responsibility for the tax returns and should review them carefully before signing and filing. If you agree to authorize us to prepare your tax return pursuant to the terms set forth above, please execute this letter on the line below designated for your signature and return the original.

ACCEPTED AND AGREED:

_____ Client Signature

_____ Date

_____ Printed Name