

Busy Season Taxes LLC
Tax Filing Engagement Letter



Company: Busy Season Taxes LLC

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Tax Preparation Engagement Letter

Thank you for choosing our firm, Busy Season Taxes LLC to assist you with your tax returns. This letter confirms the terms of my engagement with you and outlines the nature and extent of the services I will provide.

I will prepare your federal and state income tax returns. I will depend on you to provide the information I need to prepare complete and accurate returns. I may ask you to clarify some items but will not audit or otherwise verify the data you submit. I will provide a checklist to help you collect the data required for your return and will help you avoid overlooking important information.

Information you provide will be kept confidential. I restrict access to your information and maintain physical, electronic and procedural safeguards to protect your information.

I will perform accounting services only as needed to prepare your tax returns. My work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. I will, of course, inform you of any material errors, fraud, or other illegal acts I discover. The law imposes penalties when taxpayers underestimate or erroneously reduce their tax liability.

Should I encounter any evidence of purposeful fraudulent activity, our engagement will cease, and you will be subsequently notified.

My flat fee will be based on the general complexity of the return and will be quoted in advance of my work. However, if unexpected complications are discovered in the process of preparing your tax return, I will need to adjust the fee and will let you know at that time.

I will return any physical original records to you at the end of this engagement. You should securely store these records, along with all supporting documents, canceled checks, etc., as these items may later be needed to prove accuracy and completeness of a return. I will electronically

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retain copies of your records and our work papers for your engagement for seven years, after which these documents will be destroyed.

If your tax return is selected for audit by the IRS or by the state tax authorities, I am available to provide materials to you in response to correspondence. However, these are additional expenses not included in my tax preparation fees and I will render additional invoices for the time and expense incurred. Please let me know right away if you receive any letters from the IRS or any other tax agency. I will correct your return for free and pay any penalties if I am at fault. However, I am not responsible for payment of any taxes owed.

My engagement to prepare your tax returns will conclude with the electronic or physical delivery of the completed returns to you (if paper-filing), or your signature and our subsequent submittal of e-filing your tax return. Review all tax-return documents carefully before signing them.

This letter can apply to future years of tax preparation services unless the agreement is terminated or amended in writing.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign this letter in the space indicated and return it to me physically or electronically.

I appreciate your business and look forward to our future relationship. As always, please call if you have any questions.

Sincerely,

Daniel Slade

Owner, Busy Season Taxes LLC

I, the Client, agree to the aforementioned terms and conditions with my hand and signature below:

Signature _____ Date _____

Printed Name _____

Signature _____ Date _____

Printed Name _____

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