



This letter is to inform you, the taxpayer, of the services we will provide, and the responsibilities you have for preparation of your tax return.

**Tax Return Preparation**

- We will prepare your 2016 *federal* and *state* income tax returns based on information you provide. Services for preparation of your return do not include auditing or verification of information provided by you.
- This 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.
- You must review the return carefully before signing to make sure the information is correct.
- The tax return preparation fee does not include bookkeeping.
- Fees must be paid *before* your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required for preparation of late returns.
- You authorize us to file federal and state tax return extensions if we do not receive your full payment and file your final return by 1 April. This extension will be based on the tax information you have provided up to that point in time.
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
- Preparation fees do cover *limited* assistance and consultation during the year.
- The engagement to prepare your tax returns terminates upon delivery of your completed returns to you. Please store your supporting documents and copies of your tax returns in a secure place for at least seven years.
- Either party may terminate this agreement via written or electronic communication. If terminated by taxpayer, a \$50 termination fee will be assessed to cover administrative expenses.
- Any civil or legal disputes with respect to this engagement must be handled by the local jurisdiction *where the return was prepared*.

**Taxpayer Responsibilities**

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.

**Privacy Policy**

The nature of our work requires us to collect certain nonpublic personal information about you from various sources. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to any third party without your express permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access. Please contact us with any questions regarding our privacy policy.

**Fee based on provided information:** \$\_\_\_\_\_. This is subject to change if you provide additional information which complicates your tax return preparation. If this occurs, I will contact you for approval before continuing work.

By signing below, I acknowledge that I have read, understand, and accept my obligations and responsibilities and that I understand the firm's responsibilities in preparing my tax returns as explained above. By signing, I also acknowledge receipt of the firm's Privacy Policy.

If I am electronically submitting this application, I will apply my electronic signature to this form by entering my name in the appropriate signature field below. By doing so, I hereby consent and agree that my use of a keypad, mouse, or other device to enter my name in the below signature field constitutes my signature, acceptance, and agreement as if actually signed by me in writing and has the same force and effect as a signature affixed by hand.

**Both husband and wife must sign for preparation of joint returns**

✗		
	Taxpayer's Signature	Date
✗		
	Spouse's Signature	Date