



CLIENT ENGAGEMENT LETTER

Taxpayer _____
Address: _____
Phone(s): _____
Email Address: _____

This Engagement Letter is to confirm the arrangements for our tax return preparation services. We will prepare your individual and/or Business Federal and State Income Tax Return for the year _____ in accordance with appropriate tax laws and regulations. Your return will be prepared solely from the information provided by you.

For speedy completion of your taxes, please provide any information promptly to our office, if we ask for it. All information is kept confidential! No one can get or use your information from us without your permission, except for a government agency following due process of law.

ONE HALF OF ALL TAX PREPARATION FEES ARE DUE AND PAYABLE AT THE TIME OF OUR COMPANY'S ENGAGEMENT AS YOUR TAX PREPARER. UPON THE COMPLETION OF YOUR RETURN(S), THE FULL BALANCE WILL BE DUE AND PAYABLE. IF PAYMENT IS NOT RECEIVED AT TIME OF COMPLETION, A LATE CHARGE MAY BE ASSESSED TO YOUR INVOICE

TAX PREPARATION SERVICES are based on a fee schedule charged per form(s) and/or schedule(s) needed to complete your return. Additional charges may include: research basis of stocks/bonds or assets bought or sold, NOL's, multi-state returns filed, and accounting for an entire year, tax consultation for estimates, amended taxes for prior years,

OTHER SERVICES PROVIDED : Tax audit, tax estimates, accounting, EFTPS set-up, representation in audits, and offers in compromise to get control of back taxes owed. These are billed at an hourly rate. Consultation and representation fees are charged _

A minimum fee of \$150 per letter will be charged for any letters we write to IRS or any State Agencies at your request in response to a letter from them. We must have written authorization for any fax requests from banks, schools & etc.

PLEASE REVIEW YOUR RETURN(S) CAREFULLY BEFORE SIGNING AND FILING THEM. If you have any questions, please call me. THANK YOU FOR ALLOWING US TO SERVE YOU THIS YEAR! We greatly appreciate your business! This Engagement Letter will serve to apply to all future years unless the agreement is terminated or amended in writing by the taxpayer or preparer.

Sincerely yours,
Angela W. Sembel, EA

(Your company name) is not responsible for providing any of the deductions taken on my tax return(s). I have provided this information from my own records and I have proof of my deductions and income. I (we) give our permission to prepare my (our) tax return(s) and I (we) have read, understood and agree to the terms of this engagement letter and I (we) have read the Private Policy Act of this firm .

Client Signature

Date

Client Signature

Date