



Dear (print client name): _____

This letter is to confirm our understanding of the terms of our agreement and outline the nature and extent of services we will provide. Based upon the information you furnish us with, we will prepare your federal and applicable state income tax returns for the 2023 tax year.

We will not audit or verify the data you submit to us, although we may ask you for clarification when necessary. All the information you submit to us will, to the best of your knowledge, be correct and complete and include all other information necessary for the completion of your tax return.

We will also prepare 2024 estimated tax vouchers, if required, based on your income and withholding taxes for 2023. If you anticipate a substantial change in income or withholding taxes for 2024, please advise us as soon as possible. We will then determine whether an adjustment should be made to your tax estimates.

Your returns are subject to review by the taxing authorities. Any items that may be resolved against you by the examining agent are subject to certain rights of appeal. In the event of an examination, we will be available upon request to represent you, or to review the results of any examinations. Billing for these additional services will be at our standard rates.

We will not e-file your tax returns until your tax preparation fees have been paid in full. Our minimum fee for an individual tax return is \$200. Please review our price sheet to get a better idea of the total amount for your tax preparation. Also, throughout calendar year 2024 (not while we are preparing your taxes), we have the right to charge for additional tax questions (via phone or email) and/or additional copies of your tax return. There is also an additional fee if you request your return be mailed to you. This engagement does not include tax-planning services.

To timely file your tax returns, we need all required information no later than 2 weeks prior to the due date. If documents are received late, you may be charged a rush fee or be asked to extend. Please note that an extension is an extension of time to file, not an extension of time to pay taxes due.

You have the final responsibility for your income tax returns. Please review them carefully before you sign and/or mail them.



Corporate Transparency Act/Beneficial Ownership Reporting

Assisting you with your compliance with the Corporate Transparency Act (“CTA”), including beneficial ownership information (“BOI”) reporting, is not within the scope of this engagement. You have sole responsibility for your compliance with the CTA, including its BOI reporting requirements and the collection of relevant ownership information. We shall have no liability resulting from your failure to comply with the CTA. Information regarding the BOI reporting requirements can be found at fincen.gov/boi. Consider consulting with legal counsel if you have questions regarding the applicability of the CTA’s reporting requirements and issues surrounding the collection of relevant ownership information.

If the above is in accordance with your understanding of the terms and conditions of our agreement, please sign and return a copy of this letter.

Accepted By:

Client Signature: _____

Date: _____