



**Engagement Letter for Income Tax Year 2023**

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. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom tax returns are prepared to confirm the following arrangements by signing below.

**We will prepare your federal and state income tax returns from information which you will furnish to us. We will not audit or otherwise verify the data you submit**, although it may be necessary to ask you for clarification of some of the information. If you wish, we will render such accounting /bookkeeping assistance as determined to be necessary for preparation of the income tax returns. There is an additional fee for this service.

**It is your responsibility to provide all of the information required for the preparation of complete and accurate returns.** Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations and/or irregularities, should any exist. You should retain all of the supporting documents, canceled checks, and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. **You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them.**

Your returns may be selected for review/audit by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. **In the event of such government tax examination, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred.**

TAX PREPARATION SERVICES are based on a fee schedule charged per form needed to complete your return(s). **Payment is required before your return can be considered complete, and therefore, it will not be filed or released without payment.** Cash, check, and credit/debit card are all acceptable forms of payment. If your check is returned, a \$25 returned check fee will be incurred. Should an extension be filed on your behalf and the estimated payment made does not equate to the amount due, it is agreed that the additionally accrued penalties and interest will be the responsibility of the Tax Payer.

**One copy of your tax return is provided to you for no charge at the time of completion, along with your original paperwork. If an additional copy of the return is requested, physical or digital, there will be a fee of \$20 due at the time of the request.**

If the foregoing fairly sets forth your understanding, please sign below in the space indicated. Thank you for allowing us the opportunity to work with you.

Sincerely,

*Ameena Lewis, EA*

\_\_\_\_\_  
Taxpayer

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse

\_\_\_\_\_  
Date