

# J-tax-S Inc.

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## Engagement Letter for Personal Tax Return Preparation

Thank you for choosing our office to assist you with the preparation of your 2023 Personal Income Tax Returns. We look forward to working with you this year and want to confirm our understanding of the arrangements for this service. Please read this letter carefully because it is important that we establish expectations for both of us as we work together. If you have any additional questions or concerns regarding this Engagement Letter, please call to discuss before signing it.

Next, **please know a Personal Income Tax Return is due by April 15, 2024.** Please submit your information by **March 13, 2024**, to ensure your Income Taxes can be completed by the deadline. An additional extension of time to file may be requested before the due date, allowing you to extend your tax return due date until **October 16, 2024**. A **\$75 fee** is required for an extension, which will be credited to your completed tax preparation fee if the return information is received in a timely manner. If an extension is filed, please submit your information **as soon as possible, no later than August 16, 2024**, to ensure your Income Taxes can be completed by the extended deadline. The extension is an extension of time to file your tax return and not an extension to pay any tax liability due. **If any tax is due or may be due, you must pay that amount to the IRS and any applicable state taxing agency by April 15, 2024. Please inform us of this so when we file the extension, we can also schedule a payment or give you a payment voucher.** If payment for estimated taxes or expected balance due amount is not made timely, penalties and interest will be accrued.

Please note, we will be charging **additional fees** for bookkeeping services, tax consulting/planning, and business help throughout the year, also the preparation of additional schedules if these services are necessary. Our rate for these services is **\$75 per hour** with a **minimum** charge of **\$75**. Please be assured that no charges will be made to your credit card without your prior consent. All charges for tax return preparation are due and payable prior to releasing the return to the client or the filing of the return. You will be contacted with an estimate of charges if they are above the basic rate, for your approval.

### **Please note the following policies that are in effect:**

- No tax return or related information will be released until the invoice has been **paid in full!** Sorry, we do not accept payment plans. If a return is not picked up by April 15, 2024, we will **NOT** file an extension. If an extension is requested, payment needs to be made by phone, etc. prior to filing the extension. We will not charge an additional fee, however if the return is complete there will be no credit given.
- There will be a non-refundable **\$25.00 late fee** charge if an invoice exceeds 45 days past preparation completion date (date of invoice) and an additional **\$25.00** fee for every succeeding 30 days.
- My office will attempt to call you **3 times** once the return is completed. If you do not follow through with signatures and pickup, I am **NOT** responsible for late fees you may receive. If your return is rejected, we will call you again **3 times**, if you do not get back to us for the issue to be fixed, I am **NOT** responsible for timely filing the return or for any late fees, penalties, or any interest etc.

**All invoices are due and payable upon completion of the income tax return. Payment methods accepted are Cash, Personal Checks, any major credit cards with a 3% fee, or PayPal with a \$5.00 fee. There is a \$45 bounced check fee and any fees associated with collection of our fees will be your responsibility. (i.e.-court costs, attorney fees, etc.)**

For this engagement, I am not responsible for auditing or otherwise verifying all data you submit, although I will exercise reasonable professional care, including asking for further documentation and/or verbal clarification for unusual or potentially questionable items.

**You are responsible for the proper recording of financial activities, safeguarding of assets, and substantial accuracy of your financial records.** The law imposes various penalties when taxpayers understate their tax liability. We recommend you retain all documents, canceled checks, receipts and other data which forms the basis of income and deductions for at least 6 years (no less than 3 years) after filing your return. **Please remember, you have the final responsibility for the information on your income tax returns.**

**Sending our Office Information** - The best way to get information to us is via the Secure Portal. If we request information and do not receive it, after 20 days additional fees will be added to the cost of Preparation. Please call our office for instructions and log in information.

Whenever applicable tax laws are unclear or that there are conflicting interpretations of the law by authorities (e.g., tax agencies and courts), I will explain to you the possible positions that may be taken on your return. I will adopt whatever position you request on your return so long as it is consistent with the codes, regulations, and interpretations that have been promulgated. If the Internal Revenue Service or other taxing authority should later contest the position taken, there may be an assessment of additional tax plus interest and penalties. I assume no liability for any such additional penalties or assessments.

It is also your responsibility to carefully examine and approve your completed tax returns before signing and submitting them to the tax authorities. I cannot be held responsible for the subsequent disallowance of doubtful deductions or inadequately supported documentation, nor for resulting taxes, penalties, and interest. I will rely, without further verification, upon information you provide to me from third parties (K-1s, 1099s, 1098s, receipts, etc.).

**If a tax authority sends you a letter** stating there is an error on your tax return We will need to sit down and spend time figuring out what the issue is with said letter or spend time on the phone with IRS, there will be an **additional fees**. There is always a possibility that your returns may be selected for review by 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 assist you or refer you to another more qualified representative. **There will be additional charges for the time and expenses incurred.**

While I maintain high standards for myself, like any professional, there is a chance for error. In the event that you receive a notice from a tax authority related to a return I have prepared for you, and it is agreed that I made an error, I will correct your return at no charge, and also pay any penalties incurred. However, I am not responsible for any taxes or interest owed.

The engagement does not include any services not specifically stated in this letter. To formalize our relationship, we respectfully ask that you return all pages of the signed copy of this letter. As always, we appreciate your business and understanding and look forward to providing exceptional services this tax season!

#### CLIENT ACKNOWLEDGEMENT

Signature \_\_\_\_\_

Date \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_