



Individual Income Tax Return Engagement Letter

Taxpayer(s) Name: _____

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 returns are prepared to confirm the following arrangements.

We will prepare your 2016 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.

In addition to this Engagement Letter, we require the completion of the client questionnaire. This tool is used to process the preparation of your tax return. Please answer all questions, then sign and date it as it must accompany your tax documents in order for us to prepare your tax return.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You are required to retain all the documents, cancelled 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.

In connection with this engagement, we may communicate with you via email transmission. As emails can be intercepted and read, disclosed or otherwise used or communicated by an unintended third party, we cannot guarantee or warrant that emails to or from us will be properly delivered and read only by the addressee. Therefore, we specifically disclaim and waive any liability or responsibility whatsoever for interception or unintentional disclosure of email received or transmitted by us.

Our work in connection with the preparation of your income tax return(s) does not include any procedures designed to discover defalcations and/or irregularities, should any exist. We will render such accounting and bookkeeping assistance as determined to be necessary for preparation of the income tax returns.

Our fee for these services will be based upon the amount of time required at standard billing rates plus out-of-pocket expenses. If extensive time or communications become necessary to complete an accurate tax return, additional charges may apply. All invoices are due and payable upon presentation. If for any reason the account is turned over to an attorney/agency for collection, an additional charge of 33% of the total invoice, will be added to cover the cost of collection.

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Enrolled Agents are federally licensed tax practitioners who specialize in taxation and have unlimited rights to represent taxpayers before the Internal Revenue Service.

The law provides various penalties that may be imposed when taxpayers understate their tax liability. You acknowledge that any such understatement tax, and imposed penalties and interest, are your responsibility in that regard. If you would like information on the amount or the circumstances of these penalties, please contact us.

This agreement covers only the preparation of your tax return, and does not apply to services related to an audit of the return by a government agency, additional correspondence with a government agency, or other services that may be required after the filing of your return(s). If additional services are required, a separate agreement will be executed.

Notwithstanding anything contained herein, both parties agree that regardless of where the client is domiciled and regardless of where this agreement is physically signed, this agreement shall have been deemed to have been entered into at Brevard County, FL. This shall be considered the exclusive jurisdiction for resolving disputes related to this agreement. This agreement shall be interpreted and governed in accordance with the Laws of Florida.

If the foregoing fairly sets forth your understanding, please sign the enclosed copy of this letter in the space indicated and return it to our office. However, if there are other tax returns you expect us to prepare, please inform us by noting so at the end of the return copy of this letter.

NOTE: As you have the final responsibility for the income tax returns and will be signing them under penalties of perjury, please review them carefully. If you have any questions, please contact us before you sign them.

We want to express our appreciation for this opportunity to work with you.

Very truly yours,

Twila Denton Midwood, EA

President – Advanced Tax Centre, Inc.

Taxpayer

Date

Spouse (If applicable)

Date: