



Engagement Letter Between Solution Specialist and Client for Tax Return Preparation

Today's Date

(Name of Client)

(Address of Client)

This letter confirms and specifies the terms of our engagement with you and clarifies the nature and extent of the services we will provide. 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 _____ **(year)** federal or requested state income tax returns from the information that you will furnish 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. We will furnish you with questionnaires or worksheets to help you gather the necessary information. Your use of such forms will assist in keeping pertinent information from being overlooked.

Our work in preparing your income tax returns does not include any procedures designed to discover defalcations or other irregularities, should any exist. We will render such accounting and bookkeeping assistance as necessary for the preparation of the income tax returns.

We will use professional judgment in resolving questions where the tax law is unclear or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. Unless otherwise instructed, we will resolve such questions in your favor whenever possible.

The law provides various penalties that may be imposed when taxpayers understate their tax liability. Please contact us if you would like information on the amount or the

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

Our fee for these services will be based on the time required at standard billing rates plus out-of-pocket expenses. All invoices are due and payable upon presentation. 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 or email. However, if there are other tax returns you expect us to prepare, such as gift or property tax returns, please inform us by noting so just below your signature of the returned copy of this letter.

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

Sincerely, Yours

SOLUTION SPECIALIST _____
(Name of Accounting Firm)

By _____
(Printed Name and office)

(Signature of officer)

Understood and Agreed:

_____/_____
(Name of Client) (Name of spouse)

_____/_____
(Signature of officer/Client)(Signature of Spouse)