

Tax Return Engagement Letter

Thank you for selecting Hardge Connections, LLC to assist you with your tax affairs. This Engagement Letter confirms the terms of our engagement with you and the nature and extent of services that will be provided.

We will prepare your Individual Federal and State Income Tax Returns for calendar year [YEAR] in accordance with appropriate tax laws and regulations. Your returns will be prepared using information you provide to us. You will also receive a **Client Tax Organizer** to help us collect the information required for a complete tax return. Using the organizer will help you avoid overlooking important information and contribute to efficient preparation of your returns. If any additional information is requested, please provide to us as quickly as possible. All information is kept strictly confidential and you will be provided with our **Privacy Policy**. No one can get your information from us without your permission, except for a government agency following due process of law.

It is not necessary to show our office proof of what you are claiming, however, we advise you to keep all documents, canceled checks, and other data that support your reported income and deductions. They may be necessary to prove accuracy and completeness of your returns to a taxing authority. You are responsible for the returns, so you should review them carefully before you sign them or before they are electronically filed from our office.

Your returns, of course, are subject to review by the taxing authorities. However, just because you receive a letter from the IRS or your return is selected for audit does not mean there is a problem. In your interest, it is advisable to contact this office immediately upon receiving correspondence from the Internal Revenue Service or other taxing authority. We will be available to assist you in responding to any inquiries and can help you gather information. Fees charged for tax return preparation do not include audit assistance or for us preparing materials to respond to audit letters. These types of enhanced tax services are available for an additional cost. Please ask for more information.

Errors: If there is an error on the return which results from incorrect information you supplied, or neglected to provide, we are not held responsible for such errors. If an Amended Tax Return is required because of such errors, you will be subject to additional fees for us to prepare an Amended Tax Return. Rarely is a mistake made on our behalf, however, if an error does result because of an error we made, please forgive us and if an Amended Tax Return needs to be filed, we will make the correction for free.

Fees: Fees for individual income tax returns will be determined according to our current fee schedule, plus any out of pocket expenses. You will be quoted a fee for service once we have received all of your necessary paperwork and have determined what forms will be necessary to complete and to ensure we provide you with an accurate fee. Organizing records and compiling figures for entry on the tax return may slightly increase your base fee. A deposit retainer will need to be paid in advance prior to us completing your tax return and the balance will be due and payable upon completion. Full payment of your tax preparation fee is required before we will electronically file your return or release the client copy to you, unless some alternative payment method has been arranged. Rates are subject to change and are usually updated in July of every other year. One copy of your tax return will be provided to you for your files. You can choose to receive your copy by regular mail, or to pick up the paper copy in person, or to have a digital copy sent to you by email, or having an electronic copy digitally stored on a CD in which you can either pick up the CD in person or have it mailed to you. **Additional copies** by print or CD will be \$10.00 each to cover administrative fees. Additional electronic copies by email are always free.

As a service to our clients, we occasionally mail tax-related information that we anticipate will be helpful. As a courtesy, we may occasionally mail out greeting cards or promotional material.

Opt-Out: To request that we only mail you our annual appointment letter, initial here: _____

If you have any questions, please contact us. Thank you for allowing us to serve you. We greatly appreciate your business! This Engagement Letter will serve to apply to all future years unless the agreement is terminated or amended in writing by the taxpayer or preparer.

Signatures: By signing below you agree that you have read, understand, and accept your obligation and responsibilities stated above, plus you understand our responsibilities and limit of liabilities as explained above.

Taxpayer

Ktasha Hardge for Hardge Connections, LLC Date

Spouse (if a Joint Return will be filed)

Date Signed by Taxpayer(s)