



“the **RIGHT** solution for all your bookkeeping, financial consulting & tax preparation needs”

STANDARD ENGAGEMENT LETTER FOR TAX RETURNS OR AMENDED TAX RETURNS

We will prepare your federal and state income tax returns from information you will furnish to us. We may process the returns through our tax preparation software. We will not audit or otherwise verify the data you submit, although we may ask you to clarify some of it. We will be available to assist and guide you in gathering the necessary information, by furnishing you with questionnaires or worksheets and by answering your questions. It is your responsibility to provide all the information necessary to complete your tax returns.

There are substantial penalties for claiming items on tax returns that you may not be able to prove clearly with written documentation during an audit examination. You represent to us that all information you furnish to us will be true, complete and accurate, and, in addition, that you have retained all necessary written support and documentation should it be required by an IRS or state audit examination at a later date. Since you have final responsibility for the information on the income tax returns, we highly recommend that you review the tax returns carefully before signing and filing them.

You agree to provide us with copies of any government correspondence that you receive regarding tax returns that we prepare for you. Whenever possible, we will resolve the issues in your favor. We do not offer legal services; however, attorney referrals are available.

Our fees are based on the time required by the individuals assigned to the engagement, plus out-of-pocket costs according to our minimum fee schedule. Telephone or e-mail consultations, including mid-year consulting after the tax returns are done, are billed at the same standard rate as office visits. Our invoices are due upon presentation. Tax returns are paid for in advance. The undersigned agrees to pay reasonable past due collection costs including: attorney’s fees, collection agency fees, and preparer’s time spent in collection at standard billing rates. Claims for reimbursement cannot exceed the cost for that service. No guarantee is made by preparer regarding allowance of any refund, credit or item as reflected on the returns.

For amended income tax returns, each individual renders the information at will to produce new changes into the income tax return. The fee for amended tax returns starts at \$265. However, there is an \$85 sit-down fee due upfront and is non-refundable. If the client decides to proceed with our services, the \$85 fee will be credited back to the client’s total service fee. Please select from below the reason/reasons for preparing the amended tax return:

- Correct filing status
- Correct number of dependents
- Correct total income
- Correct tax deductions
- Correct tax credits
- Other: Please specify: _____

If the foregoing is in accordance with your understanding of the terms and conditions of our engagement, please sign below.

Each client is important to us! We are pleased to have you as a client and look forward to serving you now and for many years to come.

Very truly yours,

Abdiel M Ruiz,
Tax Preparer

Read and accepted by: _____ Date ___/___/___

(Spouse’s signature if applicable) Date ___/___/___

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