

Date: _____

Re: Engagement Letter for Tax Season

I, _____ (name), agree to the following:

- I have engaged the above named company to prepare my individual tax return.
- I understand and acknowledge that all information presented to prepare my tax return is true and correct.
- I agree to provide a completed tax organizer and to review all questions and provide answers for all taxable and non-taxable events for the preparation of my tax return. (Tax organizers available on line or from the office)
- I acknowledge that this tax return, while prepared by a professional tax preparer in accordance with Internal Revenue Service tax laws and guidelines, is only as good as the documents presented for its preparation.
- I further acknowledge that any documentation needed to support the data provided to complete such tax return are in my possession and that I can produce them in the event of an audit or other related events.
- **I acknowledge that I have to arrange to payment before the tax return is e-filed or delivered to me, and I have provided the completed billing policy to provide the necessary information. (Billing policy available on website or from office to complete)**
- **I agree to have this preparer e-file my federal and state returns when available and will/have signed the E-File Authorization forms required for federal and state authorities. (E-File Authorization forms will be provided during the preparation of the return)**

Signature _____

Printed Name _____

Email: _____

Contact Telephone # _____