

TAX RETURN ENGAGEMENT LETTER – TAX YEAR 2022

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. Please confirm the following:

- We will prepare your 2022 federal and state income tax returns from information which you will provide to us. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification on some of the information. We will furnish you with worksheets to guide you in gathering the necessary information. Your use of these forms will assist in keeping your fee to a minimum.
- It is your responsibility to provide all of the information required for the preparation of complete and accurate returns. You should retain all documents that form the basis of income and deductions. These documents may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns and, therefore, they should be carefully reviewed prior to signing.
- Our work in connection with the preparation of your tax returns does not include any procedures to discover defalcations and/or irregularities, should any exist.
- We will render such accounting and bookkeeping assistance as determined to be necessary for the preparation of the income tax returns.
- The law provides various penalties that may be imposed when taxpayers understate their tax liability. If you would like information on the amount or the circumstances of these penalties, please contact us.
- Your return 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 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 upon the amount of 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 this letter in the space indicated and return it to our office with your Organizer packet.**

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

Very truly yours,

Exemplar Accounting & Tax Advisors

Taxpayer(s): _____

Date: _____

 **SIGN HERE
PLEASE!**