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Phoenix, AZ 85044
(480) 829-0020
ENGAGEMENT LETTER

7227 E. Baseline Rd. #104
Mesa, AZ 85209
(480) 924-7500

Clients:

Dear Clients:

Thank you for the privilege of providing you year- round tax services. We are committed to highest quality with excellent service. The following engagement letter expresses the terms and conditions by which we will offer our services.

We will prepare both your federal and state individual/business/estate/trust income tax returns for the tax year 2019. It is your responsibility to provide all the information necessary to complete your tax returns. **You have the final responsibility for the information on your tax returns. Therefore, we recommend that you review the tax returns carefully before acknowledging accuracy with a signature.** You should retain all the documents and records to substantiate the items of income and deductible expenses that are claimed on your returns. We can assist you regarding Taxing agency's record keeping requirements by answering your questions, and, furnishing you with questionnaires and/or worksheets.

Your tax returns will be prepared with extreme care. We will use our professional judgment in resolving questions where the tax law is unclear or where different interpretations of the law exist. We will resolve such question in your favor if reasonable justification for such a position exist.

Your returns, of course, are subject to review by the taxing authorities. However, just because your return is selected for a review, does not mean that there is a problem. Should you receive any correspondence from either tax agency, contact this office immediately. We are available to assist you in settling such matters, and are available for your representation upon your request. Additional invoices will be rendered for these services, at the prevailing rate, as agreed upon mutually before the services are rendered. If there is an error on the returns prepared from **your data**, the preparer is **not** liable for the payment of the additional taxes that would have been properly due on the original return and any interest charged on such amount by the taxing agency, since you have had use of the money.

Fees are due upon completion of the work. We do, however, have the right to ask for retainer fees to be paid in advance of work done. **Fees for our services will be computed according to the "schedule of Minimum Charges". Once we work on the tax return and later on should you choose not to complete the filing process with us, our minimum charge of \$95 will become due.**

If this letter correctly expresses your understanding of our engagement, then please sign it. A copy of this letter will be furnished to you for your reference.

Preparer:

Client Signature:

Date:

Company Name:

Spouse Signature:

Date: