

Lewis Holman, EA
TAX PREPARATION AND PLANNING

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Tax Return Preparation Engagement Letter

Client (and spouse if filing jointly) Name: _____

Address: _____

City, State, Zip: _____

Thank you for selecting Lewis Holman, EA to assist you with your individual and/or business tax returns. This letter confirms the terms of our engagement and the nature and extent of services we will provide to you.

We will prepare the federal and state income tax returns you request using information you provide to us. We may ask for clarification of some items, but we will not audit or otherwise verify the data you submit. We can provide organizers, available at www.lewishoman.com, to help you gather the information required for a complete return. If you use the organizer or tax checklist, it will help you avoid overlooking important information and contribute to efficient preparation of your returns.

It is your responsibility to provide information required for preparation of complete and accurate returns. You should 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 the returns to a taxing authority. You are ultimately responsible for the returns, so you should review them carefully before you sign the efile authorization forms.

We agree to provide conscientious, competent and diligent services and at all times will seek to achieve solutions that are just and reasonable for you. We will answer any questions you have about the returns we prepare, and will advise you on responding to correspondence you receive from the tax authorities about returns we prepare.

The law provides various penalties that may be imposed when taxpayers understate their tax liability. You acknowledge that any such understated tax, and any imposed interest and penalty thereon, are your responsibility, and that we have no responsibility in that regard.

Any returns may be selected for audit by a taxing authority. In the event of a tax examination, we will help you understand what the authorities are requesting and can arrange to be available to represent you. Fees and expenses for representing you in the audit will be invoiced in accordance with terms we agree on for that engagement.

Our fee for preparation of your tax returns will be based on the nature and complexity of the tax return and is due and payable at completion. Interest charges may be added to all accounts not paid within thirty (30) days.

We will retain copies of records you supplied to us along with our work papers for your engagement for a period of four years. After four years, these papers and files will be destroyed. Your original records will be returned to you at the end of this engagement in physical or digital form, as directed by you. You should keep the original records in secure storage.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign this letter in the space indicated below and return it to us. We appreciate your confidence in us and look forward to working together. Please contact us if you have questions.

Sincerely,

Lewis Holman

ACCEPTED AND AGREED:

Taxpayer

Date

Spouse (if filing jointly)

Date