

Many Happy Returns • Judy White, Enrolled Agent

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**General Engagement Letter for Individual Tax Return Preparation**

This letter is to inform you, the taxpayer, of the services I will provide you along with the responsibilities you have for providing the correct information in order for me to prepare your tax return.

**Tax Return Preparation:** Drivers License: \_\_\_ / \_\_\_ Children: \_\_\_\_\_

- I will prepare your [redacted] federal and state tax returns based on information you provide. Services for preparation of your return do not include auditing or verification of information provided by you.
- This engagement does not include any audit or examination of your books or records. In the event your return is audited, you will be responsible for verifying the items reported.
- You must review the return carefully before signing to make sure the information is correct.
- The tax return preparation fee does not include bookkeeping. Bookkeeping is available for: \$ [redacted] per hour.
- Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed.
- **A retainer is required for preparation of late returns.**
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities. Please ask about my yearly assistance fee.
- Preparation fees cover limited assistance during the year. Please ask about additional assistance yearly fee.
- The engagement to prepare your [redacted] tax returns **terminates** upon delivery of your completed returns and original documents to you. Please store your supporting documents and copies of your tax returns in a secure place for at least seven years.

**Taxpayer Responsibilities:**

- You agree to provide us all income and deductible expense information. If you receive additional information after I begin working on your return you will contact me immediately to ensure your completed tax returns contain all relevant information. . Initial: [redacted] / [redacted]
- You **Affirm** that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, I will ask to review your documentation. Initial: [redacted] / [redacted]
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. I can provide guidance concerning what evidence is acceptable. . Initial: [redacted] / [redacted]

**Signatures.** By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities and that you understand our responsibilities in preparing your tax returns as explained above. By signing, you also acknowledge receipt of our Privacy Policy. **For a joint return, both taxpayers must sign.**

**Taxpayer:** \_\_\_\_\_  
Signature \_\_\_\_\_ Print \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_ D.O.B. \_\_\_\_\_

**Spouse:** \_\_\_\_\_  
Signature \_\_\_\_\_ Print \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_ D.O.B. \_\_\_\_\_

**Address:** \_\_\_\_\_ FBAR: Y / N [redacted] : Y / N [redacted]

**Phone / Cell:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**Privacy Policy:** The nature of our work requires us to collect certain nonpublic personal information about you from various sources. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

My firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. I will not disclose your personal information to any third party without your express permission, except where required by law. I maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access. Please contact us with any questions regarding our privacy policy.