

Washington CPA SERVICES, LLC



**365 Canal Street #2810
New Orleans, LA 70130**

TAX RETURN PREPARATION ENGAGEMENT LETTER

Dear Client:

Thank you for choosing Washington CPA Services, LLC, for your needs. We truly appreciate your business and expect this letter will outline our engagement. To ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements.

Scope of work

We will prepare the requested federal and state income tax returns for the year(s) of _____ from information that you will provide to us. We will not audit or otherwise verify the data you submit, although it may be necessary to request clarification of some of the information. Your use of forms is required to assist in keeping pertinent information from being overlooked. Therefore, we ask you to complete the following documents to guide you in gathering information and submit them to our office along with this letter.

- Tax Organizer for the corresponding year**
- Driver's license for self and spouse**
- Dependents' Social Security Cards (if first time filing)**

Your responsibilities

It is your responsibility to provide all the information required for the engagement. Information needed to complete the engagement should be submitted promptly. **If our company does not receive the necessary documents within sixty (60) calendar days of the signing of this letter,**

the client will forfeit this engagement and all funds collected with this engagement. In addition, if the final payment is not received within this time, the engagement will be considered null and void.

It is important to remember; you should retain all the documents, canceled checks, and other data that form the basis of income and deductions. These 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, you should carefully review them before you sign and file them.

Our responsibilities

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations or other irregularities, should any exist. However, should we find any inconsistencies or unusual items, we will bring them to your attention. We will render such accounting and bookkeeping assistance as determined to be necessary for the preparation of the income tax returns; however, this may require an additional fee. We will inform you in advance.

We will utilize the Internal Revenue Code and additional tax law to prepare the tax return. As such, your return will be prepared according to the tax law standards and guidelines. We will use professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.

Extension Requirements

If applicable, if an extension is required, any tax due with this return must be paid with that extension. Any amounts not paid by the filing deadline may be subject to interest and late payment penalties. **You must request our office to file an extension on your behalf. Please note, an additional fee is required to file an extension.**

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 returns 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 under a separate engagement letter for that representation.

Fees for services

Our fees for these services will be based upon the agreed invoiced amount of time required at standard billing rates plus out-of-pocket expenses. We require a nonrefundable retainer fee before the start of the engagement, which will be applied to your final invoice. The final amount is due upon completion of this engagement. **Please note that there is a nominal fee for processing your tax return which will be billed at the end of the engagement.**

You are required to pay the invoice for the completion of the tax return, whether there is an amount due or refund generated. The fee estimate is based on anticipated cooperation from you and the assumption that unexpected circumstances will not be encountered during the work performed. **If there is significant additional time required to complete the tax return, our office will discuss this with you in advance prior to moving forward.** A copy of your final return will be provided upon completion, please download and save to your files.

Tax returns will only be available for download for 120 days. If a copy of your return is needed after this time, you will be required to pay a nominal fee to our office. Thank you again for your business and we appreciate the opportunity to work with you. If there is anything you need, please do not hesitate to reach out to us.

Sincerely yours,



Ms. Kemberley Washington, CPA
CEO, Washington CPA Services, LLC

Acknowledged:

Client Name (Print) Date

Client Signature