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**Engagement Letter for Tax Preparation Services**

Dear Client:

Thank you for the privilege of allowing us to provide you with tax preparation services. We are committed to providing you the highest quality of tax preparation and excellent services. This engagement letter expresses the terms and conditions under which we will provide you with tax services and it outlines responsibilities for each of us.

**Preparation**:

* We will prepare your individual/business/entity tax returns for the period(s) you provide us with specific information. Integrity Financial Solution provides tax advice only.
* We will not audit or otherwise verify the data you submit, although we may ask you to clarify some information for us.
* We will render bookkeeping assistance as we find necessary for the preparation of the income tax returns at an additional charge.
* The client agrees to provide us with all the information required to prepare your return(s) representing that the information is accurate and complete to the best of your knowledge. You represent that the income and expense items you claim on your return(s) are substantiated by proper records and receipts.
* The client is also responsible for maintaining sufficient documentation to substantiate all items of income and deduction claimed.
* You are ultimately responsible for the accuracy of your return(s) and should review carefully before signing.

**If there is an error on the return which results from information omitted or supplied by you, you are responsible for the payment of any additional taxes which would have been properly due on the original return(s), and any interest and penalties charged by the IRS.**

\_\_\_\_\_\_\_Initial

**Fees & Payment:**

* The fees for tax preparation will be based upon the complexity of your return(s). If you request an estimate, we will give you a non-binding estimate based upon your representations about the complexity of your tax return(s). Because unforeseen or changed circumstances might affect this original fee estimate, your actual fees may exceed the original fee estimate without notification to you in advance.
* If you terminate this engagement before completion you agree to pay a fee for work completed of $75. We reserve the right to ask for retainer fees to be paid in advance of work done from new clients and any client with whom we have experience payment problems. Rates are subject to change.
* Amendment: I have been informed and understand that all amendments has a fee of $80 and up before.

**I understand that if the IRS does not release my refund, or if my refund is garnished due to ANY debt that I am responsible for my tax preparation fee starting at $199.99. I STATE THAT I HAVE ACKNOWLEDGED MY ESTIMATED REFUND AMOUNT AND TOTAL AMOUNT OF FEES FOR THE 2020 TAX YEAR.**

\_\_\_\_\_\_\_\_Initial

**Liability**:

* You agree that Integrity Financial Solution liability hereunder for damages, unless caused by our gross negligence or willful misconduct shall not exceed the total amount paid for the services described herein. This shall be your exclusive remedy.

\_\_\_\_\_\_\_\_Initial

**Privacy**:

* We are required to keep all information about our engagement confidential. We will not disclose any information about you unless we have your approval as required by law, even if you are no longer a client.

\_\_\_\_\_\_\_\_\_Initial

**Additional Copies for client or 3rd Party:**

* You acknowledge the one (1) copy of your \_\_\_\_\_\_\_ tax return(s) has been provided to you for your files. **Additional copies of your return are $25.00 each.**
* If you need to request that we fax or email a copy of your tax return(s) or any data about you to another party (i.e., mortgage lender) we will require your permission in writing or via email and payment before its sent. Please fax us your signed authorization to release the information to (251) 654-8476 or email us at integrityfinancialtaxsolution@gmail.com.

\_\_\_\_\_\_\_\_\_Initial

**By signing below, you agree that you have read, understand, and accept all obligations and responsibilities stated above, plus you understand our responsibilities and limit of liabilities as explained above.**

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Taxpayer Name (Printed) Spouse Name (printed)

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Taxpayer Signature Spouse Signature

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date