



## General Engagement Letter for Individual Tax Return Preparation

This letter is to inform you, the taxpayer, of the services we will provide you, and the responsibilities you have for preparation of your tax return.

### *Tax Return Preparation*

- We will prepare your 2023 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 including your books or records. In the event your return is audited, you will be responsible for verifying the items reported.
- We will ask questions or for further documentation per our due diligence obligations to the IRS if necessary,
- **The tax return preparation fee does not include bookkeeping.**
- **If bookkeeping needs to be done to complete your tax return, you will be put on extension and the bookkeeping and taxes will be completed sometime after April 30th.**
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to audit correspondence from taxing authorities.
- Preparation fees do cover limited assistance during the year for current year tax correspondence received.
- The engagement to prepare your 2023 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.
- You understand that we will prepare the tax return using information that was provided by you and under virtual currency tax law as it is now understood. We are **NOT** responsible for the taxes, penalties or interest that may result from withheld information or from changes/interpretations of virtual currency tax laws.

### *Taxpayer Responsibilities*

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- 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. We can provide guidance concerning what evidence is acceptable.
- You must review the return carefully before signing to make sure the information is correct.
- **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 may be required prior to starting work.
- You should keep a copy of your tax return and any related tax documents. You may be assessed a fee if you request a copy in the future and due to IRS regulations **we will no longer keep more than 3 years of tax returns.**

**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. For a joint return, both taxpayers must sign.

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Taxpayer

Spouse

Date

**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, work-sheets, 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.

Our 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. We will not disclose your personal information to any third party without your express permission, except where required by law. We 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.