

Synergy Tax & Accounting Inc

Vancouver, Washington

www.synergytax.net

synergytax@gmail.com

Engagement Letter for Individual Tax Return Preparation

This letter is to confirm our understanding of the terms of our engagement and the nature and limitations of the services that I provide, and the responsibilities you have for the preparation of your tax return.

Tax Return Preparation

- I will prepare your _____ federal and state tax returns in accordance with appropriate tax laws and regulations. Your return will be prepared solely based on information provided by **you**.
- 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.
- Tax preparation services are based on a fee schedule charged per form(s) and/or schedule(s) needed to complete your return. Additional charges may include: research basis of stocks/bonds or assets bought or sold, NOL's, multi-state returns filed, and accounting for an entire year, tax consultation for estimates, amended taxes for prior years.
- Fees must be paid before your tax return is e-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.

Taxpayer Responsibilities

- You agree to provide me with 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.
- 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.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state taxing authority. I can provide guidance concerning what evidence is acceptable.
- Occasionally I make mistakes, please forgive me for being human. Be courteous and let me know if you receive any letters from the government. I do correct returns for free and pay any penalties, if I am at fault. However, I am not responsible to pay any taxes owed.
- **Please review your returns carefully for accuracy before signing the e-file form.** If you have any questions, please call me. Thank you for allowing me to serve you this year! I greatly appreciate your business!

Signatures. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities and that you understand my responsibilities in preparing your tax returns as explained above. By signing, you also acknowledge receipt of my Privacy Policy.

Taxpayer

Spouse

Date

I do/do not have foreign accounts.

Privacy Policy. The nature of my work requires me to collect certain nonpublic personal information about you from various sources. I collect financial and personal information from applications, work-sheets, reporting statements, and other forms, as well as interviews and conversations with my clients and affiliates. I may also review banking and credit card information about my clients in the performance of receipt of payment. Under my policy, all information I 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. I restrict access to your confidential information to those within my 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 me with any questions regarding my privacy policy.