

2023 Engagement Letter for Individual Tax Return Preparation

Bette Wagner, CPA

Tax Return Preparation

- I will prepare your 2023 federal and, if necessary, state tax returns based on the information you provide. Services of preparation of your return do not include auditing or verification of information provided by you.
- In the event your return is audited, you will be responsible for verifying the items reported.
- Fees charged for tax return preparation do NOT include audit representation or preparing materials to respond to correspondence from taxing authorities.
- Preparation fees do cover limited assistance and consultation during the year.
- The engagement to prepare your 2023 tax return terminates upon delivery of your completed returns and original documents to you. Please store your documents and copies of your tax returns in a secure place for at least 5 years. You will be assessed a fee if you request a copy in the future.
- I will store tax records for a period of five years after the applicable file date. At the end of that period all records will be destroyed using a secure document destruction service.

Fees and Payment

- My fees are based on the number and type of forms used and on the levels of skill and responsibility involved.
- If requested, I will provide you with an estimate of the fees involved before commencing. I can only provide this estimate based on your prior year's tax returns that may be different from the current year.

Taxpayer Responsibilities

- You agree to provide all income and deductible expense information by **Wednesday, March 20, 2024**, or I may have to file an extension for your 2023 tax returns.
- You affirm that all expenses or other deductible 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 tax authority.
- You must review the return carefully before signing e-file documents to make sure the information is correct.
- **Fees must be paid before your tax return is filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed.**

If you have any questions regarding this letter of engagement, please do not hesitate to call or email me.

To signify your acceptance of the terms of engagement, please sign below.

I appreciate your business and thank you for working with me.

Taxpayer

Spouse

Date