

# 2024 Engagement Letter for Individual Tax Return Preparation

**Bette Wagner, CPA**

## **Tax Return Preparation**

- I will prepare your 2024 federal and, if necessary, state tax returns based on the information provided. Services for return preparation do not include auditing or verification of this information.
- If your return is audited, you are 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 2024 tax return terminates upon delivery of your completed returns and original documents. Please store your documents and copies of your tax returns in a safe place. You will be assessed a fee if you request a copy in the future.
- I will store tax records five years after the applicable file date. At the end of that period, I will destroy all records using a secure document destruction service.

## **Fees and Payment**

- My fees are based on the number and type of forms used and 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, which may differ from the current year.

## **Taxpayer Responsibilities**

- You agree to provide all income and deductible expense information by Monday, March 24, 2025, or I will file an extension for your 2024 tax returns.
- If I am missing any information on Monday, March 31st, an additional fee of \$100 will be added to your invoice.
- 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 you 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 ensure the return 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. Thank you for working with me.

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*Taxpayer*

*Spouse*

*Date*