



## Engagement Letter for Individual Tax Return Preparation

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

### *Tax Return Preparation*

- I will prepare your **2023** federal and state tax returns based on information you provide.
- 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.
- Assisting you with your compliance with the Corporate Transparency Act, including beneficial ownership information reporting, is not within the scope of this engagement.
- The tax return preparation fee does not include bookkeeping. Additional fees apply for these services.
- My fees will be based on the nature and complexity of the engagement, the degree of responsibility involved, and the time spent performing services. Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
- The engagement to prepare your tax returns terminates upon delivery of your completed returns. Please store your supporting documents and copies of your tax returns in a secure place for at least seven years.

### *Taxpayer Responsibilities*

- You agree to provide 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 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. Services for preparation of your return do not include auditing or verification of information provided by you. You will assume responsibility for providing accurate information and for the outcome should inaccurate information be provided. Further, you agree to release, indemnify, defend, and hold Gail Glazebrook Accounting, Inc. harmless from any liability and costs resulting from the knowing or negligent misrepresentations by you of facts relevant to any analysis undertaken in our engagement.
- You must 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 to make sure the information is correct. Fees must be paid before your tax return is filed. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required for the preparation of late returns.
- You agree to use the online tax portal for all sensitive material delivered electronically to my office. Further you agree you will not e-mail, text, or message any document that contains sensitive information.
- You agree to pay for services rendered upon receipt of my invoice. Payments not received within 30 days will incur a 1.5% late fee per month.

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

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.

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Taxpayer Name	Signature	Date
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Spouse Name (required if filing jointly)	Signature	Date
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**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, worksheets, 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.