

## General Engagement Letter for Tax Return Preparation

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*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 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.
- \* You must review the return carefully before signing to make sure the information is correct.
- \* The tax return preparation fee does not include bookkeeping.
- \* 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 is required for preparation of late returns.
- \* Fees charged for tax return preparation do not include audit representation or preparing of materials to respond to correspondence from taxing authorities.
- \* Preparation fees do cover limited assistance and consultation during the year.
- \* The engagement to prepare your 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.

### 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 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 taxing authority. We can provide guidance concerning what evidence is acceptable.

### 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.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

### Privacy Notice

It is the policy of V. Bowles & Associates LLC to handle the information you provide with the utmost confidentiality and care. We restrict access to nonpublic personal information about you to members of our firm who need to know this information in order to complete the work you have hired our firm to do. We will not disclose your personal and confidential information to anyone outside this firm without your express permission to do so. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your nonpublic personal information.