

# Kathy's Tax Service LLC

## 2022 Tax Year

### General Engagement Letter for Individual Tax Return Preparation

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 2022 federal and state tax returns based on information you provide. 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 returns are audited, you will be responsible for verifying all items reported. You acknowledge and understand it is your responsibility to be able to verify and prove all items on the return(s), including the following: any itemized deductions, relationship and support of any dependents, stocks & mutual fund transactions, capital asset purchase and/or sale, rental property, sole proprietorship and/or farm income and expenses, where applicable.
- You must review the return carefully before signing to make sure your information is correct.
- The tax return preparation fee does not include bookkeeping.
- Preparation fees must be paid before your tax returns are delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay an hourly fee for the 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.
- Preparation fees do cover *limited assistance and consultation* during the year.
- The engagement to prepare your 2022 tax returns ends 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 (7) years.

#### Taxpayer Responsibilities:

- You agree to provide us with 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 tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are correct and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to supply written records of all items included on your return if audited by either the IRS or any state tax authority. We can provide guidance concerning what evidence is acceptable.

**SIGNATURE(S):** 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. For a joint return, both taxpayers must sign.

Signature(s): \_\_\_\_\_

Taxpayer

Spouse

Date Signed: \_\_\_\_\_

Privacy Policy: The nature of our work requires us to collect certain nonpublic personal information about you and your family, if applicable, from various sources. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our company has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services requested by you. We will not disclose your personal information to any third party without your express permission, except where required by law. We keep physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.

We know that you have confidence in our ability to perform the services requested by you. Equally important to us is your confidence in knowing that all your personal information is safe.

Please contact us at (251) 843 5153 with any questions or concerns about our privacy policy.