

TAX YEAR 2023

Thank you for choosing [KATHY'S TAX SERVICE, LLC](#) to complete your tax return this year. We look forward to working with you.

In the letter below, you will find the terms, nature, and extent of the services to be provided, and you will be asked to confirm your understanding of any mutual responsibilities.

Please **read** the letter below and **sign**, so we can begin working on your **2023** tax returns.

Important Deadlines

April 15th, 2024 — Deadline to pay and file tax returns or extensions.

March 31st, 2024 — Deadline to submit your tax information to [KATHY'S TAX SERVICE, LLC](#).

If information is received after **March 31, 2024**, you WILL be subject to an additional fee starting at \$50 per day and/or an extension may be filed on your behalf.

Your federal and/or state income tax returns will be prepared with the information you provide. You will provide [KATHY'S TAX SERVICE, LLC](#) with complete and accurate information up front. [KATHY'S TAX SERVICE, LLC](#) will keep the information you provide confidential. Services will be provided only as needed to prepare your tax return(s). No audit or verification of the submitted data will occur. However, [KATHY'S TAX SERVICE, LLC](#) will follow up to request clarification and/or documentation of information as needed. You will also be notified should any material errors, fraud, or other illegal acts be discovered.

You are responsible for reporting any foreign activities upon signature. By signing this letter, you acknowledge that you will inform us of any income from foreign sources or if you have signatory authority over any foreign financial accounts. If you are still determining whether income/accounts are foreign, please disclose this regardless so we can review it. Failure to report these types of activities will result in severe penalties.

You will be responsible for providing all necessary documentation required by law to support your data. This includes expenses for gifts, travel, vehicle use, meals, charitable contributions, and so forth. If you need clarification on what documentation is required at any given time, please reach out to discuss further. Professional judgment will be used to resolve issues when tax law is unclear or when there is conflict among authorities. But ultimately, you, the taxpayer, have the final responsibility for your tax return(s). Therefore, it is imperative that you carefully review all documents before signing and filing them.

[KATHY'S TAX SERVICE LLC](#) may also provide a checklist for you to complete up front, which will ensure we collect your most up-to-date information. Completion is optional, but it can help remind you what items are needed. Nonetheless, upon signature, please provide originals/copies of originals for all government tax documents (W-2s, 1099s, 1098s, and property tax statements). All records will be returned to you after we have finished serving you. We recommend you store them securely, as well as supporting documents, in case they are needed later in the tax preparation process. [KATHY'S TAX SERVICE, LLC](#) will retain copies of all records, paperwork, and notes for at least five (5) years, after which these documents will be securely disposed of or destroyed.

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Please remember that if we are preparing a joint return for you and your spouse, tax returns and copies of all supporting documents will be made available to both spouses without the other spouse's consent or notification.

The filing deadline for tax returns is **April 16th, 2024**. All information must be received by **March 31st, 2024**, to meet the filing deadline. If additional time to file is needed, your provided information will be used to prepare the extension. Please remember that to prepare a valid and accurate extension, we will need as much information as possible, prior to the start of preparation. You will also need to expressly approve filing an extension before this can be done on your behalf. **As a reminder, an extension only provides you with additional time to file your returns, not to pay. Taxes paid after April 16th, 2024, will result in late fees and interest.**

Tax preparation fees will be charged based on the complexity of work and will be quoted before the start of any work. Should any complications arise as your tax return(s) are being prepared, fees may be adjusted accordingly. Invoices are due and payable by **APRIL 13th**. To the extent permitted by law, an interest charge may be added if not paid within thirty (30) days of receipt. Important reminder: Tax returns will only be filed electronically after fees are paid in full.

Should the IRS or state tax authorities audit your return, please let **us** know immediately (as soon as letters are received from the IRS/any other tax agency), so **we** can react accordingly and be available to assist you. If **KATHY'S TAX SERVICE, LLC** is at fault, your return will be corrected for free, and **KATHY'S TAX SERVICE, LLC** will pay any applicable penalties. If **KATHY'S TAX SERVICE, LLC** is not at fault, *you will be responsible for any taxes owed, in addition to any additional fees for correction.*

This agreement will conclude at the time completed returns are delivered to you (paper-filing), or upon signature and submission of your tax return(s) (e-filing).

Under federal and most state laws, **KATHY'S TAX SERVICE, LLC** is required to file your returns electronically. However, you can opt out of electronic filing without explanation. If you prefer not to e-file, there will be an additional print fee of \$25.00. Please contact **us** directly, so **we** can provide you with the proper government opt-out forms. These must then be signed and returned to **KATHY'S TAX SERVICE, LLC**.

To agree to this letter and its summary of our arrangement, please sign below and return it in person or electronically. Work will not begin until a signed copy of this engagement agreement is returned. Should you be filing a joint return, both spouses are required to sign.

Thank you for putting your trust in **KATHY'S TAX SERVICE, LLC**. Please do not hesitate to reach out if you have any questions or concerns.

All the best,
KATHY'S TAX SERVICE, LLC

Acknowledged by:

Signature: _____ Date: _____
Print name: _____

Signature: _____ Date: _____
Print name: _____

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