

ENGAGEMENT LETTER

TO: LINDENBUSCH ACCOUNTING & TAX SERVICE, INC.

I/we have engaged your firm to prepare my/our individual (1040) Federal and State(s) income tax returns for _____ and future years until such time I/we notify you verbally or in writing of my/our decision to disengage your services. Non-contact with your firm on my/our part in subsequent filing season(s) will also be deemed by your firm as disengagement.

I/we understand that it is my/our responsibility to provide you with all of the information required to complete my/our tax returns. In that regard I/we state that, to the best of my/our knowledge and belief:

1. I/we have provided true, correct, and complete information regarding my/our income as listed on the attached Form W-2, 1099 and/or attached written summaries. I/we understand that it is my/our responsibility to provide all the information necessary to complete the returns. I/we will retain for a minimum of **four** years all the documents, receipts, cancelled checks, and other records required to substantiate the items of income and expense claimed on my/our returns.
2. I/we have provided true, correct, and complete information regarding amounts I/we have presented to you to claim as tax deductions, and I/we have maintained written documentation supporting all amounts, including logbooks and receipts. I/we understand that if a question arises regarding the interpretation of tax law, and a conflict exists between the tax authorities' interpretation of the law, and other supportable positions, that you will use your professional judgment in resolving the issues.
3. I/we understand that because taxing authorities may examine (audit) the returns, that documentation should be retained to support the information provided to you, especially business travel and entertainment deductions, business use percentage of autos and other business assets and barter activities, and that penalties may be imposed on returns that are late, underpaid, or incorrect.
4. I/we understand that you will not audit or otherwise verify any information, that you may require clarification or additional information, that you are not responsible for disallowed deductions, or the inclusion of additional unreported income or any resulting taxes, penalties or interest.
5. I/we understand that I/we may be charged an additional fee if you are asked to assist or represent me/us in a tax audit, examination or enquiry. I/we understand that I/we are still responsible for additional tax, penalty, or interest that may arise due to such an audit or examination.
6. I/we will contact you immediately if I/we discover additional information that will lead to a change in my return, or if I/we receive any letters from the IRS or state taxing authorities.
7. I/we understand that advice given verbally or via the telephone may incur additional fees and due to lack of written documentation on your part can be subject to misunderstanding or revision due to rapidly changing tax laws.
8. **I/we understand that your fee's will be assessed on a return by return basis and can be mitigated by my/our organized presentation of documents necessary for tax preparation. My/our fee will be due and payable upon completion of these returns, and that additional services will not be performed until the fee for these services is paid in full.**
9. I/we understand that I/we are to receive a FILE COPY of the completed tax return as well as all of my records and documents. If I/we require another copy(s) a **\$15.00 charge per return per year** will be assessed by your firm.
10. I/we understand that either spouse can sign this engagement letter and your firm will deem that the non-signing spouse, having signed the federal Form 8879 authorization to E-file, is in agreement with the conditions herewith.

I/we have read, understand, and accept the conditions of this engagement letter and have read the privacy policy of your firm.

Client Signature, Taxpayer

Date

Client Signature, Spouse (Optional)

Date