



**Engagement Statement for the Preparation of Your 2023 Tax Returns**

We appreciate the opportunity to work with you and advise you regarding your income tax situation. This letter specifies and confirms the terms of our engagement with you and to clarify the nature and extent of the services we will provide. We want you to know the limitations of the services you have asked us to perform. If you are confused at all by this engagement, please call us before you sign it.

We will prepare your 2023 federal and all state tax returns you request using the information you provide to us. We will ask for clarification of some items, but we will not audit or otherwise verify the data you submit. We encourage you to use our worksheets and questionnaires to help you gather the information required for a complete and accurate return and avoid overlooking important information for the preparation of your tax return.

The Internal Revenue Service imposes penalties on taxpayers, and also upon us as tax return preparers, for failure to observe due care in reporting for income tax returns. It is your responsibility to provide all of the information required for the preparation of a complete and accurate tax return. The only accounting or analysis work we do is that which is necessary for the preparation of your income tax return.

You should retain all documents, canceled checks, receipts, and other data that support your reported income and deductions. Those records may be necessary to prove the accuracy and completeness of the returns to the taxing authorities. By submitting this information to us, you are representing that you have written documentation of the data submitted. You have the final responsibility for your income tax returns and you should review them carefully before you sign and file them.

Any person or entity subject to the jurisdiction of the U.S. having a financial interest in, signature or other authority, over bank accounts, securities or other financial accounts, in a foreign country, shall report such a relationship. Failure to disclose to U.S. Dept. of Treasury may result in huge penalties. If you do not provide us with any information regarding foreign income, we will presume you have no foreign assets or accounts. If you do report accounts in a foreign country, it is ***your responsibility***, if required, to file your FinCen online. We assume no liability for penalties associated with the failure to file or late filing of any of these forms.

Our fees for services will be based on our current schedule of per-form charges and/or standard billing rates. All invoices are due and payable when picking up your completed return.

If Accurate Tax makes an error on an income tax return that results in additional taxes being assessed, it is our policy to file whatever correspondence or amended returns are needed to correct such error at no cost to the client. The client agrees to pay any additional tax assessed., as they would have been owed even if the error had not occurred. Accurate Tax agrees to refund the client for any penalties and interest assessed up to the date that the error was discovered and corrected.

An error by Accurate Tax specifically does **NOT** include the following: Any adjustments involving failure to have adequate records or unreported income; any adjustments or disallowances of deductions, exemptions or credits based on facts and circumstances not proven to have been known, or could not have reasonably been known, by Accurate Tax at the time the return was prepared; retroactive tax law changes; any adjustments based on missing income not proven to have been provided to Accurate Tax at the time of the tax return preparation.

We will retain copies of your tax returns for a period of at least 4 years. All of your original records will be returned to you at the time you pickup your 2023 tax return. You should keep the originals in secure storage.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign and date below in the space(s) indicated. We appreciate your confidence in us.

**(NOTE: Both spouses must sign for preparation of joint returns.)**

\_\_\_\_\_  
Signature

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

\_\_\_\_\_  
Signature

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