

Engagement Letter and Privacy Disclosure Notice

To: Accounting & Tax Services, Inc.

I have engaged your firm to prepare my 2020 Federal and State Individual income tax returns. I understand that it is my responsibility to provide you with all of the information required to complete my tax return. In that regard I state that, to the best of my knowledge and belief:

1. I have provided true, correct, and complete information regarding my income and tax deductions. I will retain for seven years all the documentation, receipts, cancelled checks, logbooks and other records required to substantiate the items of income and expense claimed on my return. I understand that if a question arises regarding the interpretation of tax law, and a conflict exists between the tax authority's interpretation of the law, and other supportable positions, that you will use your professional judgment in resolving the issues.
2. I 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.
3. I 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.
4. Our fee does not include responding to the IRS or State Authorities. If you require any additional services to respond to your needs or inquiries, or to address correspondence by government authorities, you will be billed at our standard rates for the nature of the service provided. I understand that, in the event of preparer error, I am responsible for additional tax that may be due, but that the extent of your responsibility is to pay for any penalty and interest that the IRS or the above state revenue department may assess.
5. When records are returned to me, it is my responsibility to review my tax return and retain all supporting documentation. I will contact you immediately if I discover additional information that will lead to a change in my return, or if I receive any letters from the IRS or state taxing authorities.
6. I understand that your policy is to put all tax advice in writing, and that I will not rely upon any unwritten advice because it may be tentative, incomplete, or not fully reviewed.
7. I understand that your bill will be due and payable upon completion of these returns, and that additional services will not be performed until the bill for these services is paid in full. I understand that your bill will be based upon a schedule of tax forms prepared.
8. If an extension is required, I understand that an extension gives me more time to file the return but not more time to pay. All payments should be remitted by April 15, 2021 for 2020 tax liabilities to avoid late payment penalties.
9. It is my responsibility to keep a copy of this return and I will receive a copy when I sign the e-file authorization forms. Additional copies may be obtained from your office for a minimal \$25 fee to cover administrative costs per each request.
10. In the event of a dispute, the matter must be communicated in writing within one year from the date of completion of the work product to be valid and enforceable from this engagement. Thereafter, you waive all other claims except those concerning our fees.

Privacy Policy

It has always been the policy of Accounting & Tax Services, Inc. to keep all information that we collect from you, confidential from all sources. We restrict access to all nonpublic personal information about you to members of our firm who need to know that information to provide services to you. We do collect nonpublic personal information about you from the following sources:

- Information we receive from you on tax preparation organizers, worksheets, Federal and State tax reporting forms, and from other documents we use in tax preparation or other financial and related services.
- Information about your transactions with us, our affiliates, and others
- Information we may receive from outside agencies such as banks and brokerage houses

We do not disclose any nonpublic personal information about our clients or former clients, except as permitted, required, or approved by you in writing as listed below:

- Requirements to comply with federal, state, or local law
- Requirements to comply with national, state or local licensing rules
- Requirements to disclose information in respond to legal subpoenas
- Items you permit or request us to disclose, as authorized by you in writing.
- Information that you authorize us to disclose by signing this engagement letter to electronically file your returns
- Information that you authorize us to disclose by signing this engagement letter, which discloses that you are our client, without disclosure of financial or other personal information.

I have read, understand, and accept the conditions of the engagement letter and the privacy policies discussed above.

Client Signature _____ Date _____

Spouse Signature _____ Date _____

Printed Name(s) _____ Telephone Number _____

Email Address _____

*****I prefer an Electronic Copy or Printed Copy of my 2020 Individual Tax Return. ***
(Please Circle One)**

As always, payment is due when the tax return is complete. My preferred payment method is check or cash. I also accept credit cards (Visa or MC) if you'd prefer, but there will be a 3% credit card processing fee to cover the cost charged by your credit card company. If you'd like for me to charge your credit card upon completion of your return please complete the section below:

Credit Card Number: _____

Expiration Date: _____ CVV (3-digit code on back of card) _____