



**Signature  
Required**

## **ENTITY ENGAGEMENT LETTER**

Dear Client:

We appreciate the opportunity to work with you and advise you regarding your income tax returns. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements.

We will prepare your 2018 federal and requested \_\_\_\_\_ state income tax returns from information which you will furnish to us. You represent that the information you are supplying to us is accurate and complete to the best of your knowledge and that your expenses for meals, entertainment, travel, contributions and vehicle use are supported by records as required by law. The firm relies solely on information furnished by you. There is no responsibility on the part of the firm to audit, verify or extensively analyze the information provided. It is therefore your responsibility to make certain that all information submitted is accurate and complete, though it may be necessary to request clarification of some information. We will render bookkeeping assistance as determined to be necessary for the preparation of your returns. **If additional bookkeeping/accounting work is necessary, there will be an hourly charge for this service in addition to the cost of the actual return. If you would like to request a quote for these services in advance, please let us know.**

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all documents, cancelled checks and other data that form the basis of income and deductions for a period of seven years. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. Our firm policy is to retain copies of selected documents used in the preparation of your returns for a period of three years. After three years, our files are destroyed by an outside contractor. A signed engagement letter and deposit are required before we will be able to begin processing your return.

According to IRS regulations, **you have the final responsibility for the data used to prepared income tax returns** and, therefore, you should review them carefully before you sign them. If any changes are required, **it is your responsibility** to inform us so necessary corrections to your returns are made prior to filing.

In connection with the preparation of your income tax returns, we do not perform any procedures designed to discover defalcations or other irregularities, should any exist. We will use our professional judgment in resolving questions where the tax law is unclear. However, it is understood that you remain responsible for any adverse determination by the taxing authorities or the courts. Any information you provide during the preparation of your returns is confidential; however, the courts have held it is not protected by any Accountant-Client privilege.

Our fee for all of the aforementioned services will be based upon the forms needed and the amount of time required, at standard billing rates in effect at the time the services are rendered. The firm's fee does not include responding to IRS inquiries, and the firm is not responsible for

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*'Accounting Solutions for Small Businesses'*

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IRS disallowance of doubtful deductions unsupported by adequate documentation, nor for resulting penalties and interest. If your returns are selected for examination by the taxing authorities, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred. All invoices are due and payable upon completion of your returns. In the event of collection proceedings, you will be charged collection expenses and reasonable attorney fees.

The engagement does not include any services not specifically stated in this letter. If this letter fairly sets forth your understanding, please sign it in the space indicated. If there are other tax returns you expect us to prepare, such as Local Business License, Federal Gift tax, or prior year returns, please inform us by noting so at the end of this letter.

We want to express our appreciation for this opportunity to work with you.

Very truly yours,

*Tim Miller*

*Brandon Layo*

*Steven Katz*

Tim Miller, CPA

Brandon Layo, CPA

Steven Katz, CPA

Accepted By: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_