

2024 INCOME TAX PREPARATION ENGAGEMENT LETTER

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This letter is meant to confirm the services we will provide you, and inform you of the responsibilities you have in preparation of your tax returns:

We will prepare your Federal, state and local (as applicable) Individual Income Tax Returns for 2024, from the information you provide. We will not audit or otherwise verify the information you submit, although we may ask you to clarify it.

We will prepare the above-referenced tax returns for filing with the Internal Revenue Service (IRS) and applicable state and local income tax authorities . Our work is not intended to benefit or influence any third party, either to obtain credit or for any other purpose.

It is your responsibility to provide all the information required for the preparation of complete and accurate tax returns. You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. You must be able to provide written records for all items included on your returns if audited by the taxing authorities. We can provide guidance concerning what evidence is acceptable.

Assisting you in your compliance with the Corporate Transparency Act, including beneficial ownership information (BOI) reporting, is not within the scope of this engagement.

It is your responsibility to notify us if your filing status has changed from your last income tax return filing. If you wish to change your filing status, or have any questions or concerns about your filing status, please discuss this with us before your returns are prepared.

We will use our judgement in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and their supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible. If the IRS or local authority should later contest the position and prevail, we assume no liability for any additional taxes, penalties or interest that may result.

When filing electronically with IRS, they require that you sign an e-file authorization form indicating you have reviewed the return, it is correct to the best of your knowledge, and you (both) authorize us to submit it electronically. We cannot submit any return until we have the appropriate signed authorizations.

The filing deadline for individual income tax returns is April 15, 2025. In order to meet this filing deadline, the information needed to complete the returns should be received by this office by March 15, 2025. If we receive your information after this date, we will make every effort to complete your returns without an extension, but will give priority service to those clients who submitted information on time.

If an extension of time is required, any tax due with returns must be paid with that extension. Any amounts not paid by the filing deadline may be subject to interest and late payment penalties. Please contact us if you need an extension filed and for advice on avoiding penalties.

Your tax returns are subject to audit by the IRS and local tax authorities. Any items resolved against you in an audit are subject to certain rights of appeal. We are available to assist or represent you in the event of an audit. However, our tax preparation fee does not include responding to inquiries or examination by taxing authorities.

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Fees for this engagement will be based on complexity and will be assessed upon completion of the returns. We will provide a fee quote upon request. Invoices are due and payable upon presentation. For any late payments not prearranged with us, we reserve the right to assess late fees and collection costs, and a monthly interest charge may be assessed until full collection is made. We reserve the right to not release or e-file your returns until full payment is received or other payment arrangements have been made. We will provide you with one (1) paper copy or one (1) electronic copy of your 2024 tax returns for your records, as part of our preparation fee, and reserve the right to charge an extra fee for additional requests.

Our engagement to prepare your 2024 tax returns will conclude with the delivery of the completed returns to you (if paper-filing), or your signature and our subsequent submittal of your tax returns (if e-filing). If you have not elected to e-file your returns with our office, or a return is not eligible for e-filing, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them. You authorize us to leave voicemails, send texts or emails or other electronic messaging to you as needed.

Required: Please sign where indicated on this page and return this letter to us, indicating you agree to the terms of the engagement and that you have received a copy of our **Privacy Policy**.

We are pleased to have you as a client and look forward to a long and mutually beneficial relationship.

Sincerely,

Keith Kenward CPA

Accepted By: (Please print your names and sign; both signatures required for joint returns)

Taxpayer Name: _____ Spouse Name: _____

Signature: _____ Signature: _____

Date

Privacy Policy

We do not disclose any non-public personal information about our clients or former clients to anyone without written approval from the client or former client, except as required by law. We restrict access to non-public personal information to our internal staff as necessary for tax preparation, bookkeeping and administrative support.

We maintain physical, electronic, and procedural safeguards to guard your non-public personal information.

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