

# 2020 TAX PREPARATION ENGAGEMENT LETTER

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Kenward CPA LLC  
38800 Van Dyke, Suite 1000  
Sterling Heights, MI 48312

This letter is meant to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide:

We will prepare your Federal, State, and local (as applicable) Individual Income Tax Returns for 2020 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 solely for filing with the Internal Revenue Service (IRS) and applicable state and local 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. We do not keep any original client records, so we will return those to you at the completion of the services rendered under this engagement. You should retain in your files all the documents, bank records and other data that form the basis of income, deductions, and credits. If you have any questions on the type of records required, please ask for our advice in that regard.

We will prepare your tax returns based upon your filing status (single, married filing jointly, married filing separately, head of household or qualifying widow(er) with dependent child) as reflected in your income tax returns for last year. If your filing status has changed, you wish to change your filing status, or you have questions about your filing status, please discuss this with us before your returns are prepared.

We will use our judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other 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 taken 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, 2021. In order to meet this filing deadline, the information needed to complete the returns should be received in this office by March 25, 2021. 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 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 taxing authorities. Any items resolved against you in an audit are subject to certain rights of appeal. We are available to assist 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 are happy to provide a fee quote upon request. Invoices are due and payable upon presentation. Any late payments not prearranged with us will be subject to 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.

Our engagement to prepare your 2020 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 return (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.

**Required:** Please sign where indicated on this page and return this letter to us with your tax data, indicating you agree with 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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