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Engagement Letter

Thank you for choosing me, **D Christine Krieger, EA - Taxes & More**, to assist you with your taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will review your current federal and state income tax returns. We will depend on you to provide the information we need to complete an accurate assessment and provide recommendations. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. Review or revision of prior years' returns are also available at an additional charge.

We will perform services only as needed to review, revise, or prepare your tax returns.

Our work will not include procedures to find misappropriated funds or other irregularities: As tax professionals we are not required to audit your tax return. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit.

We will, of course, inform you of any material errors, fraud, or other illegal acts we discover.

The IRS and other tax agencies impose penalties when taxpayers underestimate their tax liability. To avoid such penalties, we offer, as part of our services, to calculate quarterly estimated payments or to correct wage withholdings.

Please keep us informed about any changes in your financial situation and above all any IRS or State notices received!

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will explain the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

Our fee will be based on the complexity of your tax return & the tax forms involved. A price range will be communicated before we start your tax return. Additional time required, e.g., research, IRS contacts, review of prior year returns, etcetera will be billed at a **standard hourly billing rate of \$210**. Different rates may apply to Tax Planning and Financial Coaching.

Invoices are due and payable upon presentation. To the extent permitted by state law, a late fee of \$25 may be added to all accounts not paid within 15 days and any returned checks.

We will return your original records to you at the end of this engagement. You should securely store these records, along with all supporting documents, canceled checks, etc., as these items may later be needed to prove accuracy and completeness of a return. We will retain copies of the records which show federal or state withholdings and our work papers for your engagement for up to seven years, after which these documents will be destroyed.

Our engagement to prepare your tax returns will conclude with the delivery of our analysis of your return along with any recommended clarifications or corrections. If you have not selected to e-file your returns with our office, you will be solely responsible for filing the returns with the appropriate taxing authorities.

Please carefully review all tax-return documents before signing them.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign in the space indicated.

Signature

Date

Spouse's signature (if present)

Date