

2016 Engagement Letter Highlights

- Tax return prep starts AFTER you have signed this engagement letter.
- Your deadline to get your paperwork to us is April 1st, 2017.
- We do not verify or audit the numbers you give to us. You agree that your numbers are true and correct.
- We will provide an organizer only IF you request one.
- Payment is expected when taxes are reviewed prior to e-filing.
- We will not file your taxes until you have signed and returned 8879 consent to e-file document.
- Documents on the portal will now be stored for 12 months, and in order to provide this service, we will be charging \$10 on every invoice.
- A separate engagement letter and fee is required for all other services outside the scope of preparing this tax return.
- We are not obligated to amend or represent you before the IRS on any tax filing that was not completed by our office.
- If you need an extension to file, you must request one.
- If you request an extension, we must have documentation no later than September 15th, 2017 to meet the October 15th, 2017 deadline.
- We will not share your info with any 3rd party without your consent.
- If you have money in a foreign bank account, you must tell us prior to filing.
- Our liability is limited to the amount of your tax prep fee.
- If we make a mistake on your tax return, we will pay the penalties and interest if you notify us within 3 days of an IRS adjustment.
- If we make a mistake on your taxes that reduces your income (and your tax), we are not obligated to pay the excess tax because you truly did make the money.