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This letter is to inform you, the taxpayer, of the services we will provide to you, and the responsibilities that you have for preparation of your tax return.

## Tax Return Preparation

* We will prepare your 2022 federal and state income tax returns based on the information you provide. Services for preparation of your tax return do not include auditing or otherwise verifying the information provided by you. We will, however, make all reasonable inquires to verify the completeness and accuracy of your information. We will not conduct any behind-the-scenes investigations or otherwise obtain any information from third parties.
* This engagement does not include audit or other examination of your books or records. You agree that you possess sufficient evidence to support all items claimed on your tax return. Should your tax return be audited, you will be fully responsible to substantiate all income and expenses claimed. We can, however, provide general guidance to advise you what information will be acceptable in the event of an audit.
* The engagement to prepare your 2022 income tax returns terminates upon delivery of your completed tax returns and the original documents back to you. Once your tax returns have been electronically filed with the IRS and the state(s), our work will be considered as completed. Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities, such as IRS and state notices requesting additional information. That service can be provided as a separate engagement.

## Taxpayer Responsibilities

* You agree to provide us with all income and expense information. If you receive additional information after we begin working on your tax return, you will contact us immediately to ensure that your completed tax returns contain all relevant information.
* You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records, such as receipts, bank statements, mileage logs, etc. In some cases, we will ask to review your documentation if the position you are trying to claim appears questionable.
* You must review your completed tax return carefully before signing to make sure the information is correct. If you have any questions on your tax return, please be sure to ask us for clarifications prior to signing. Once we obtain your signature and receive your payment, we will submit your tax returns to federal and state taxing authorities. Any corrections after that point will require filing an amended tax return and will result in additional fees.
* Our due diligence rules require us to retain copies of certain documents in connection with preparing your tax returns. These may include, but not limited to, birth certificates, proof of residence, social security cards, driver licenses, etc. As tax professionals, we are required to comply with these rules.
* All fees must be paid before your tax return is delivered to you. If you terminate this engagement before completion, you agree to pay a fee for the work done.

**Signatures.** By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities and that you understand our responsibilities in preparing your tax returns as explained above. For a joint return, both taxpayers must sign.

Taxpayer Spouse Date