Dear:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Thank you for choosing at **(D5 Tax Services, LLC)** to assist you with your **(2021)** taxes return this letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your **(2021) federal** and **state** personal or business income tax returns. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. An Organizer is enclosed to help you collect the data required for your return. The Organizer will help you avoid overlooking important information. By using it, you will contribute to efficient preparation of your returns and help minimize the cost of our services.

We **will not** perform accounting services to prepare your tax returns. Our work **will not** include procedures to find defalcations or other irregularities. 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.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline 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 forms necessary and complexity of your return. Invoices are due and payable upon presentation. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (**30**) days.

It is your responsibility to review your returns before they are filed to determine that all income has been correctly reported and that you have substantiation for your deductions. You must pay the balance owed for our services and provided a signed e-file authorization to assure the return is filed by the due date. To assure completion by the **(Tax Due Date & Year)** due date we **must have all information by (Enter 3 Weeks before Tax Due Date)**. To assure completion by the extended deadline of **(Enter Extension Due Date)** we must have all information by **(Enter Two Weeks Before Amendment Due Date)** If you know you will need an extension, please let us know now. **An extension gives you additional time to file your tax return. An extension DOES NOT extend the time to pay the taxes owed. Penalties and interested are applied to taxes paid after the April 17th due date. If you need and extension and think you may owe please give us as much information as you can or let us know how much, if any, you can pay with the extension.**

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 your records and our work papers for your engagement for three years, after which these documents will be destroyed. We recommend that you retain records for 7 years.

Our engagement to prepare your **(2021)** 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 selected to e-file your returns with our office, you will be solely responsible to file

the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them.

Additional copies of your return requested are an additional fee of **(Enter Amount for Copy $25.00)** per copy. Also there will be a **( Personal $175.00)** charge for all personal returns that the preparation work is done and client chooses to not allow us to e-file the return, and **(Cost for Business $250.00)** charge for all business returns that are likewise.

This engagement **does not** include work for **accounting**, **tax planning** or **tax representation** which includes but not limited to state/federal audits, liens, levies, garnishments or correspondence ect.

To affirm this letter correctly summarizes your understanding of the arrangements for this work, please sign this letter in the space indicated and submit via the portal. We appreciate your confidence in us. Please call if you have question.

Sincerely,

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**(CaTonya Scott c/o D5 Tax Services, LLC)**

**Accepted by:**

Sign: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TAXPAYER 1

Print: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Sign: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TAXPAYER 2

Print: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_