



Thank you for choosing my firm to provide you with income tax services. This letter confirms the services I will provide.

I will prepare your federal and state returns based on information you provide. It is your responsibility to ensure that you provide me with all tax documents and IRS correspondence relevant to your tax return. Although my work will not include procedures to discover irregularities or inaccuracies in the tax data you provide, I may ask for clarification of certain information, or additional information, so that I can prepare accurate and complete returns for you.

It is your responsibility to provide all necessary information related to income and deductions, and to respond to my inquiries in a timely manner so that I can accurately complete your returns by the appropriate due dates. It is your responsibility to answer my questions truthfully and completely. I will review all documents and answers provided by you.

You are responsible for maintaining appropriate records, such as official tax documents you receive, receipts, and substantiation for your deductions, and purchase and sales information for assets.

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. Filing your returns by the due dates is your responsibility.

If your returns are later selected for review or audit by taxing authorities, I will be glad to assist or represent you if you desire. My fees for preparing your returns do not include time that might be necessary to assist you during a taxing authority review.

If you later discover that you missed income, such as brokered transactions, a 1099, or a w-2, I will be glad to prepare an amended tax return for you if you desire. My fees for preparing your tax return do not include the time necessary to amend your tax return.

My fees for preparation of your 1040 and schedules start at a billing rate of \$325 for a single year individual return and \$75 per hour for services above the "normal" individual tax return, including stock transactions, real estate income (Sch E), and business income (Sch C or E). My invoices are due and payable upon presentation with your tax return draft.

For amendments of prior year tax returns, tax planning, tax review, audits, communication with the IRS on your behalf, FBAR and Form 8938 preparation, and other tax services the rate is \$75.00 per hour.

Acts that undermine my ability to provide proper representation of you, failure to meet the taxpayer responsibilities noted above, failure to provide truthful and complete answers to questions, or failure to timely remit the agreed upon fees, are some situations that may result in termination of services.

If this letter accurately summarizes your understanding of our agreement relating to the tax services you have requested, please sign the enclosed copy in the space indicated and return it to me.

Thank you again for choosing my firm to provide you with tax services. I look forward to working with you and appreciate your business.

Sincerely,

*Patrice Thompson*

Accepted by:

\_\_\_\_\_

Date \_\_\_\_\_

\_\_\_\_\_

Date