

Dear TAXPAYER CLIENT:

I thank you for allowing me to work with you regarding the preparation of your income tax return(s). I will give you and your family's tax situation my professional attention. I am trained and committed to providing excellent and accurate tax preparation service consistent with current tax law.

In order for a mutual understanding between us, in this letter I am covering information about the services and responsibilities of which Jeremy Andries and ANDRIES TAX SERVICE will provide along with your responsibilities as CLIENT(S). This engagement letter will cover a few legal requirements as well.

I will prepare your federal and state income tax returns from information you provide. I will make no audit or other substantiation/verification of your submitted data but I may need to ask you more questions for clarification of your information.

You may download the client organizer to guide you in gathering the necessary information for me. Completing the organizer checklist before our appointment will assist me in the efficient and accurate completion of your return(s) as well as reduce the amount of fees and time required for your return. All the information submitted by you will, to the best of your knowledge, be correct and complete, and will include all income, deductions and other data necessary for the preparation of your income tax return(s).

If our business relationship is engaged on or after April 1st and before April 15th, or if before April 15th I am still missing information, I may plan to prepare and file an extension for you. Note that an extension allows additional time to complete and file your return, but it does not allow for an extension for paying the appropriate amount of tax due. An estimate of your tax liability will be required, and you may need to include a tax payment with the request for extension to file.

My fee for tax preparation services will be based upon the amount of forms and schedules as well as the time required to complete your tax return. This is based upon the information disclosed on the client organizer checklist and during our appointment. If additional information is disclosed after an estimate is given that affects the amount of time and/or schedules and forms to complete the tax return then the fee may be increased.

You are responsible for substantiating and keeping the necessary records of your personal and small business income and deductions. You have the final responsibility for the income tax returns and timely filing. You should review the returns carefully before you sign and have them filed.

All invoices are payable prior to releasing your copy of the tax return and/or electronically filing the return.

ANDRIES TAX SERVICE will maintain records of all tax information for three (3) years after the later of the tax return due date or the filing of your tax return and/or amendment(s). A Privacy and Confidentiality Notice is available online and you agree that you have reviewed that document.

Your return(s) may be selected for review by the IRS and/or state agencies. If there is such a government tax review, I will be available upon request to assist you. If asked about preparation questions then my out-of-pocket expenses will be covered. If asked to attend a review in regards to a tax position that you've taken then I may require additional compensation. Should a tax agency rule against us in a tax issue because your return was prepared incorrectly, ANDRIES TAX SERVICE's liability is limited to the penalty and original fees that was paid for the tax preparation but not the income tax due because your tax liability remained if the return had been originally prepared correctly.

By signing below you agree that you have read, understand, and accept your obligations and responsibilities stated above, plus you understand my responsibilities and limit of liabilities as explained above. For a joint return, both the taxpayer and spouse must sign this agreement letter. I will enclose a copy of this letter for your files.

Sincerely,

Jeremy Andries, CFP®

ANDRIES TAX SERVICE

Accepted by CLIENT:

TaxPayer - print _____ sign _____

Spouse, if any - print _____ sign _____

Date - _____