



CHAMBERLIN

EST. 2002

Thank you for choosing Chamberlin to assist you with your income tax preparation. This letter outlines the terms of our engagement, including the scope of services, deadlines, and important considerations.

Services:

We will prepare your federal and state income tax returns based on your provided information. While we may request clarification or supporting documents, we will not audit or independently verify the accuracy of the data. You are responsible for maintaining all necessary documentation as required by law, such as records for meals, travel, gifts, vehicle use, and charitable contributions. Please let us know if you have any questions about the required documentation.

Responsibilities:

You are ultimately responsible for the accuracy of your tax return and any associated penalties or interest. Please carefully review your return before signing and filing. We will exercise professional judgment in addressing unclear tax laws or conflicting interpretations.

Deadlines:

If an extension is needed, we will prepare it based on the available information. Please note that an extension only grants additional time to file, not to pay. Taxes paid after the due date may incur penalties and interest.

Joint Returns:

For joint returns, either spouse can access the returns and supporting documents without the other spouse's consent or notification.

Foreign Activities:

You are required to disclose any foreign income sources or financial accounts. Please inform us of any such activities, and we are happy to clarify any questions you may have. Penalties for non-compliance with foreign reporting requirements can be severe.

Tax Examinations:

Should your return be selected for examination by tax authorities, we will be available to assist you. Please note that additional fees may apply for this service.

Record Retention:

We will retain copies of your tax documents for three years, after which they will be securely destroyed. Original documents will be returned to you upon completion of your returns. You are responsible for keeping your records for potential future use, including tax audits.

Fees:

Our fees may vary depending on the type of return and forms required. Please refer to our fee schedule for additional information. Additional fees may be required based on the time spent preparing your returns. We will advise if this applies to your situation. Invoices are due upon receipt, and tax returns will not be filed electronically until payment is received.

Tax Payer Signature: _____

Spouse Signature:: _____