



## Legacy Tax Solutions, LLC Engagement Agreement

Thank you for the privilege of allowing us to provide you with tax preparation services. This engagement letter expresses the terms and conditions under which we will provide you with tax services, and it outlines responsibilities for each of us.

### Tax Preparation:

- We will prepare your federal and state tax return(s) with supporting schedules for the applicable tax year based on information you provide us.
- You will provide any requested records needed in order to complete the tax return(s) preparation. Original records will be returned upon completion of the tax return(s), however, it is recommended that you provide photocopies to prevent data loss. We are not responsible for lost, damaged, or stolen records.
- You will provide all information to us no less than 30 days prior to the expected delivery date of the tax return(s). Although we will endeavor to extend the due date of your tax return(s) if they are not done by the filing deadline, ultimately you may be subject to late filing penalties because of the delay.
- We will not audit or otherwise verify your records to discover errors or omissions, should any exist. However, if we find irregularities or unusual items, we will bring them to your attention and/or ask for clarification.
- We will provide bookkeeping assistance necessary to complete the tax preparation at an additional charge.
- You attest that income and expense items you claim are substantiated by proper records and receipts, and can furnish such documentation in the event of an audit.
- You attest that the information you provide is accurate and complete to the best of your knowledge.
- You are ultimately responsible for the accuracy of the tax return(s) and should review all documents carefully before signing.

### Fees & Payment:

- All preparation fees are invoiced per tax return per tax year.
- Our fees are based on the complexity of your tax return(s) as well as out-of-pocket expenses.
- Tax preparation fees must be paid before we will electronically file or release your tax return(s) to you.
- We reserve the right to ask for a retainer to be paid in advance of work done from new clients and any client with whom we have experienced payment problems.
- If you terminate this engagement before completion, you agree to pay for time and expenses incurred prior to the date of termination, even if the tax return(s) are not completed.
- In the event the client has any past due balances, we reserve the right to cease working on your tax return(s) or providing any other services until the balance has been paid in full or other acceptable payment arrangements have been made.
- Past due balances of more than 30 days are subject to 18% annual interest.
- At anytime after 60 days past due, your account may be sent to collections. You are responsible for any court costs, attorneys' fees, and any costs resulting from collection attempts.

### Important Notices:

- Where tax law is ambiguous or unclear, we will use our best judgement. Unless otherwise instructed by you, we will resolve such questions, when possible, in your favor.
- Penalties can be imposed when taxpayers understate their tax liability. If you would like information on these penalties, please contact us.
- If an extension of time is required, any estimated taxes owed must be paid when the extension is filed. Any amounts not paid by the filing deadline are subject to interest and late payment penalties.
- The IRS does not permit us to discuss your tax return except if authorized by the client by checking a specific box on your tax return. Unless otherwise instructed by you, we will check the box which authorizes the IRS to discuss your tax return with us.
- Your tax return(s) may be selected for audit by tax authorities. We are available to represent you or prepare materials in response to correspondence. However, these are additional expenses not included in our tax preparation fees and we will render additional invoices for the time and expenses incurred.
- One printed or digital copy of your tax return(s) will be provided to you for your files. Additional copies requested within 10 days of filing your return are \$10 each. Copies at any other time are \$25 each. These expenses apply to digital copies for the time and effort involved in providing this service.
- If you require us to release a copy of your tax return(s) to a 3rd party (e.g. mortgage lender) we will require your permission in writing or via email. Postage and copy fees stated above will be invoiced for this effort (\$25 minimum).

This engagement letter will apply for all future years tax preparation services unless the agreement is terminated in writing or amended in writing by you or the tax preparer. Please sign and return this letter by email, fax, or mail. Please keep a copy for your records.

We want to express our appreciation for this opportunity to work with you.

Very truly yours,



**Cole Bruner, President**  
**Legacy Tax Solutions, LLC**

Company Name (if applicable): \_\_\_\_\_

Taxpayer Name (please print): \_\_\_\_\_

Taxpayer Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Taxpayer Spouse Name (please print): \_\_\_\_\_

Taxpayer Spouse Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Signed on Behalf of Legacy Tax Solutions, LLC: \_\_\_\_\_ Date: \_\_\_\_\_