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Required Engagement Letter

Thank you for choosing Tax Happens to prepare your income tax returns for tax year 2017 with a filing due date of April 17, 2018 and an extended due date of October 15, 2018. This letter confirms the services we will provide.

We will prepare your federal and state returns for tax year 2017 based on information you provide. Although our work will not include procedures to discover irregularities or inaccuracies in the tax data you provide, we may ask for clarification of certain information, or additional information, as we review the documents provided and prior year returns. This is so that we can prepare accurate and complete returns for you.

It is your responsibility to provide all necessary information related to income and deductions for tax year 2017, and to respond to our inquiries in a timely manner so that we can accurately complete your returns by the appropriate due dates. 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. We recommend keeping this information for 7 years.

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 April 17, 2018 due date we **must have all information by Friday March 16, 2018**. To assure completion by the extended deadline of October 15, 2018 we must have all information by **Friday September 14, 2018**. 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 interest are applied to taxes paid after the April 17th due date. If you need an 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.**

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

We determine our fees for preparation of your return once we receive all the information need to prepare your return. We require a 50% deposit and the balance when we provide you with a draft or two weeks after requests for additional information go unanswered. If a material number of additional documents and information, that impact the return, are provided after we determine our fee there may be additional fees. It is very rare that we must charge additional fees and we will let you know if there will be additional fees and how much when the applicable information is received. To avoid additional fees please complete the client organizer and provide all documents as soon as possible. If you don't have all information just let us know what, if anything, is missing.

If this letter accurately summarizes your understanding of our agreement relating to the preparation of your tax returns, please sign below and in the space indicated and return this letter or a signed copy of this letter to us.

Thank you again for choosing Tax Happens to prepare your 2017 tax return. We appreciate your business.

Sincerely,

THERESA TURNER, CPA MST

Accepted by:

Sign: _____
TAXPAYER 1

Date _____

Print: _____

Sign: _____
TAXPAYER 2

Date _____

Print: _____