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Required Engagement Letter

Thank you for choosing Tax Happens LLC to assist you with your taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your federal and, if applicable state income tax returns. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. **Please utilize our Organizer(s) to help you collect the data required for your return. The Organizer will help you avoid overlooking important information. By using it, you will contribute to the efficient preparation of your returns and help minimize the cost of our services.**

We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will inform you of any material errors, fraud, or other illegal acts we discover.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

We determine our fees for preparation of your return once we receive all the information needed to prepare your return. We require a 50% deposit to begin and the balance when we provide you with a draft or two weeks after requests for additional information go unanswered by you. 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.**

We will return your original records to you at the end of this engagement. Store these records, along with all supporting documents, canceled checks, etc., in a secure location in case these items are needed later to prove accuracy and completeness of a return. We retain copies of your records and our work papers for your engagement for seven years, after which these documents will be destroyed.

Our engagement to prepare your tax returns will conclude with the delivery of the completed returns to you (if paper-filing) or your signature and our subsequent submittal of your tax return (if e-filing). If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them. Our engagement DOES NOT include audit support. We will review and discuss all tax notice related to this tax year at no additional charge to you. Any notice that will require additional work will require additional fees for services. These fees will be determined and discussed prior to us completing any additional work.

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 provide a signed e-file authorization to assure the return is filed by the due date. Tax returns are due the 15th day of the 3rd or 4th month following the close of the tax year. To assure completion of your **personal return (Form 1040)** by the April 15 due date **we must have all information by March 15**. To assure completion of your personal return by the extended deadline of October 15 we must have all information by **September 15**. To assure completion of your **business return (Form 1120S, 1065 or 1120)** by the March 15th due date **we must have all information by February 15th**. To assure completion of your business return by the extended due date of September 15th we must have all information by **August 1st**. 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 15th 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.**

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, sign the enclosed copy of this letter in the space indicated and return it to us in the envelope provided.

Thank you for the opportunity to be of service. If you have any questions, contact our office at (813)304-5569.

Theresa Turner
Tax Happens LLC
(Both spouses must sign for preparation of joint returns.)

SIGNATURE

DATE

Accepted By:

Accepted By:

TAXPAYER 1

DATE

TAXPAYER 2

DATE