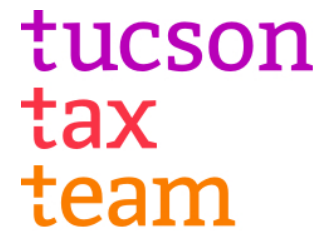


1040 Engagement Letter Tax Year 2019



Taxes solved.

Thank you for using Tucson Tax Team LLC for your tax preparation needs. Clear communication is a key to a successful business relationship. The purpose of this letter is to ensure we share an understanding of the services we provide.

Our Responsibilities

We will prepare your Federal and State tax returns based on information you provide. Services for preparation of your return do not include auditing or verification of information provided by you.

- Tax preparation fees are based on the forms and schedules needed to complete your return. Additional charges apply for compilation of information, research of asset basis, NOLs, 1099s, FIN CEN, and other domestic and foreign reporting forms.
- Preparation fees cover limited assistance and consultation during the year; they do not include audit representation, preparing materials to respond to correspondence from taxing authorities, or complex tax projections.
- Information you provide will be kept confidential. However, our discussions are not protected by any form of attorney-client privilege. We cannot ignore the implications of any information you provide in the process of preparing your return. If you file a joint return, there is no privacy for or from your spouse in regard to our tax services.
- We do not guarantee that the IRS or state taxing authority will timely accept your tax return if filed within 5 days of the filing deadline.
- We will recommend filing an extension if all information needed to complete your return has not been received by us by April 1st.
- Occasionally we make mistakes; please let us know if you received any letters from the government. We correct returns at no cost if we are at fault, provided we are notified immediately of any error. We are not responsible for paying any additional tax owed.
- We will provide simple tax planning at no additional cost between May and October; complex tax planning and any tax planning required after November 1st will be billed at our hourly rate.

Taxpayer's Responsibilities

- You agree to provide us all income and deductible expense information. You affirm that all deduction amounts are accurate and that you have all required supporting written records.
- You must be able to provide written records of all items included on your return if audited by the IRS or state taxing authority. We can provide guidance concerning what evidence is acceptable. We recommend you keep proof of deductions for a minimum of 7 years.
- Please review the return carefully before signing to make sure the information is correct.
- Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay \$150 per hour for work completed. A retainer is required for preparation of late returns.
- Some forms must be paper filed with taxing authorities; it is your responsibility to have any mailings tracked to ensure proof of receipt.

Tax Questions:

YES

NO

- I/we had foreign income or assets, including foreign gifts or foreign retirement accounts.
- I/we sold, purchased or traded real estate, virtual currency or other assets, including a foreclosure/repossession.
- I/we have refinanced or taken a home equity loan on my current home.
- I/we had health insurance through the Marketplace.
- I/we have or will make out of pocket retirement plan contributions.
- I/we made estimated tax payments.
- I/we gave a gift in cash/property or forgave a loan in excess of \$15,000 per individual during the year.

Please select from the following:

Write/receive checks Direct deposit/debit Apply to next year

If I owe tax:

For refunds:

Extension payment:

Direct Deposit of Refund or Debit for Payment of Tax

Account type

Routing # _____ Account # _____

Checking

Savings

Date for direct debit: _____

Signatures

By signing below, you acknowledge that you understand and accept your obligations and responsibilities and you certify that the bank information provided above is correct.

Client Signature

Date

Client Signature (if joint return)

Date

Print Last Name

Print Last Name