



Taxes solved.

# Estate / Trust Engagement Letter

*Thank you for using Tucson Tax Team for your tax preparation needs. Clear communication is key to a successful business relationship. The purpose of this letter is to make sure we both have the same understanding of the services we are providing.*

**Our responsibilities:** Our responsibility is to accurately prepare your Federal and State Estate or Trust Income tax returns. We will complete these returns using the information you provide to us. Although we may ask for explanation regarding certain items, we will not be auditing or verifying any information. If we encounter a situation in which the tax laws are unclear, we will advise you of it and use our professional judgment as to the correct handling of the situation.

**Your responsibilities:** Your responsibility is to provide us with all the information needed to prepare the return. As Trustee or Fiduciary you are required to keep receipts and other documents that substantiate the amounts that you are claiming on this return. These may be necessary to prove the accuracy of the information on your return to a taxing authority. We recommend you keep tax receipts for a minimum of 4 years.

You are ultimately responsible for what is claimed on the fiduciary tax return, so you should review the return carefully before signing it. We will be happy to give you any explanation you need. If you receive a notice from a taxing authority claiming that the Estate/Trust owes additional taxes, please contact our office before you reply or make any payments. These notices are often incorrect. Because there are strict time frames in which to respond, please contact our office as soon as you receive any such notice.

**Confidentiality:** Information you provide will be kept confidential, but is not protected from the IRS or the state. We cannot disregard the implications of any information you provide in the process of preparing the return.

**Fees and deadlines:** Our fees are based upon our fee schedule and complexity of the tax return. Providing us with complete and organized information is the best way to reduce your tax preparation costs. Unless other arrangements have been made in advance, we require full payment of your preparation fees before we file your returns.

Your returns are subject to review by taxing authorities. Should an examination occur, we will be available to represent you at an additional fee. If any interest or penalties are assessed, they will be your responsibility.

We cannot guaranty the completion of your tax return unless all information is received within ten days of the filing deadline. If all information is not received by that time we reserve the right to file an extension on your behalf.

If this letter is in agreement with your understanding of this engagement, please sign below.

Signature

Date

Print Name of Trust / Estate

For office use only			
Received copy of Trust Documents	Y	N	Received copy of Will
			Y N