

# 1099 / 1096 Preparation Engagement Letter



Taxes solved.

*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:** We will prepare, from information you provide, Federal and State (if applicable) Forms 1099/1098 and Transmittal Form 1096. We will not audit or review any information you provide to us to prepare these forms. We will not prepare Forms 1099/1098 and Transmittal Form 1096 without your signature on this engagement letter.

**Your responsibilities:** It is your responsibility to determine the recipients of your 1099s from your company's books and records, to gather the recipient's correct information required to issue the 1099s, to retain proper receipts and other documents in your office in compliance with 1099 filing. **You are responsible for mailing the completed forms to the taxing authorities and to the recipients by their respective due dates.**

A failure to file penalty may occur if you do not file these forms by **January 31st**. We have no responsibility for any penalty that may arise from your failure to provide 1099 information to our office, for late filing or failure to file, or for incorrect information reported on these forms.

**Fees:** We charge a set-up fee of \$25 and an additional \$10 per 1099/1098 prepared. Fees are payable upon delivery. Reprints due to errors on your part will incur additional charges.

If the foregoing is in accordance with your understanding, please sign below and return it to our office with your 1099 recipient information **NO LATER THAN JANUARY 24<sup>th</sup> to guarantee timely preparation.**

Company or Payer Name (please print) \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

I will pick up; call when ready.      Mail completed forms to me at above address.

Mail completed forms to this address instead:

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_