

Engagement Letter and Privacy Disclosure Notice

To: ABOT Tax Service

I have engaged your firm to prepare my Individual (1040) Federal and state of _____, and/or Corporate (1120, 1120S, 1065) income tax returns for the year ended _____. I understand that it is my responsibility to provide you with all of the information required to complete my tax return. In that regard I state that, to the best of my knowledge and belief:

1. I have provided true, correct, and complete information regarding my income as listed on the attached Forms W-2, 1099 and/or attached written summaries. I understand that it is my responsibility to provide all the information necessary to complete the returns. I will retain for four years all the documents, receipts, cancelled checks, and other records to substantiate the items of income and expense claimed on my return.
2. I have provided true, correct, and complete information regarding amounts I have presented to you to claim as tax deductions, and I have maintained written documentation supporting all amounts, including logbooks and receipts. I understand that if a question arises regarding the interpretation of tax law, and a conflict exists between the tax authorities' interpretation of the law, and other supportable positions, that you will use your professional judgment in resolving the issues.
3. I understand that because taxing authorities may examine (audit) the returns, that documentation should be retained to support the information provided to you, especially business travel and entertainment deductions, business use percentage of autos and other business assets and barter activities, and that penalties may be imposed on returns that are late, underpaid, or incorrect.
4. I understand that you will not audit or otherwise verify any information, that may require clarification or additional information, that you are not responsible for disallowed deductions, or the inclusion of additional unreported income or any resulting taxes, penalties or interest.
5. ***I understand that I will be charged and additional fee if you are asked to assist or represent me in a tax audit, examination, or inquiry.*** I understand that, in the event of preparer error, I am responsible for additional tax that may be due, but that the extent of your responsibility is to pay for any penalty that the IRS or the above state revenue department may assess.
6. I will contact you immediately if I discover additional information that will lead to a change in my return, or if I receive any letters from the IRS or state taxing authorities.
7. I understand that your policy is to put all tax advice in writing, and that I will not rely upon any unwritten advice because it may be tentative, incomplete, or not fully reviewed.
8. ***I understand that your bill will be due and payable upon completion of these returns, and that additional services will not be performed until the bill for these services is paid in full. I understand that your bill will be based upon a schedule of tax forms prepared.***
9. I understand that you will not file any federal, state, or local tax extensions without my specific written request to do so.
10. If there are other services or tax returns that I expect you to prepare, such as estate, gift, fiduciary, property, or other states or cities, I will note them at the bottom of this letter.

Privacy Policy

It is our policy here at ABOT Tax Services to keep all information that we collect from you, confidential from all sources. We restrict access to all nonpublic personal information about you to members of our firm who need to know that information to provide services to you. We do not disclose any nonpublic personal information about our clients or former clients, except as permitted, required, or approved by you in writing.

Tax Payer Signature _____ Date _____

Spouse Signature _____ Date _____

NOTE: BOTH MUST SIGN, IF MARRIED (EXCEPTION SURVING SPOUSE)