



Taylorsville, NC  
828-352-8205

## General Engagement Letter for Individual Tax Return Preparation

This letter is to inform you, the taxpayer, of the services I will provide you, and the responsibilities you have for preparation of your tax return.

### **Tax Return Preparation**

- I will prepare your 2023 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.
- This engagement does not include any audit or examination of your books or records. In the event your return is audited, you will be responsible for verifying the items reported.
- The tax return preparation fee does not include bookkeeping.
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
- Preparation fees do cover limited assistance and consultation during the year.
- The engagement to prepare your 2023 tax returns terminates upon delivery of your completed returns and original documents to you. Please store your supporting documents and copies of your tax returns in a secure place for at least three years.

### **Taxpayer Responsibilities**

- You agree to provide me all income and deductible expense information. If you receive additional information after I begin working on your return, you will contact me immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, I will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. I can provide guidance concerning what evidence is acceptable.
- You must 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 a fee for work completed. A retainer is required for preparation of late returns.

**Signatures.** By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities and that you understand my responsibilities in preparing your tax returns as explained above. For a joint return, both taxpayers must sign.

- You should keep a copy of your tax return and any related tax documents.

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*Taxpayer*

*Spouse*

*Date*

**Privacy Policy.** The nature of my work requires me to collect certain nonpublic personal information about you from various sources. I collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with my clients and affiliates. I may also review banking and credit card information about my clients in the performance of receipt of payment. Under my policy, all information I obtain about you will be provided by you or obtained with your permission.

I have procedures and policies in place to protect your confidential information. I will not disclose your personal information to any third party without your express permission, except where required by law. I maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.

Please contact me with any questions regarding my privacy policy.