

# ***BOTTOM LINE'S ENGAGEMENT LETTER***

Thank you for choosing my firm to prepare your income tax returns. This is a letter of agreement regarding this service. The objective of this letter is to communicate terms and conditions of this service.

In order to complete this service, you will be asked to provide information. It is your responsibility to make sure the provided information is complete and accurate. The service does not include any verification of the information you provide, although you may be asked to clarify some of the information. It is your responsibility to maintain records of this information since you may need to satisfy tax authority inquiries.

You have or will shortly examine and carefully review the completed tax return to verify all income and expenses have been included and the information it contains is true and accurate according to the information and documentation you furnished. You will confirm that nothing was added or deleted during the preparation which would understate any tax liability. You acknowledge that the best efforts have been rendered to arrive at the lowest legal tax liability and that we have discussed possible consequences that could arise from positions taken on your return. Any concerns or questions have been discussed and clarified. This engagement ends with the delivery of the tax return.

## **PROTECTION PLUS:**

The current year's tax return will include a Protection Plus Audit Assistance and ID Restoration membership (assuming it is filed timely). In the event that you receive a letter from the IRS or the State about your current year's tax return, Protection Plus audit defense services will be available at no additional costs. They will also provide identity theft restoration services to assist in the event you face any kind of identity theft incident.

**COLLECTION:**

The fees for these services are indicated on the invoice and are due when the return is completed. After the first reminder bill, any fees not paid will be subject to interest at 12% per year (1% per month). In addition, a \$5.00 charge will be added for each reminder notice sent. Reminder notices will not be mailed more than one time a month. Information obtained may be used to collect past due fees. A \$25 charge will apply to any returned check. It is agreed that any legal proceedings will be conducted in Tuolumne County. Please note that additional fees beyond those invoiced for return preparation may be necessary (e.g. audit representation). You will be contacted for approval prior to the incurrence of additional fees.

**PRIVACY STATEMENT**

We do not disclose any non-public personal information about our customers or former customers to anyone, except as instructed to do so by such customers or as required by law. We restrict access to non-public personal information to those professionals necessary to prepare your tax return and we maintain physical, electronic and procedural safeguards to guard your non-public personal information. If you do wish to have us discuss your information with someone else, a specific disclosure statement must be signed and returned with an original signature.

**INFORMATION DISTRIBUTION:**

We may occasionally have products or services that we think may be of interest to you. By signing below, you give consent to receive automated phone calls and/or text messages at the phone number(s) you have provided. (Not a condition for purchase.)

If this letter accurately summarizes your understanding of our agreement relating to the preparation of your tax return, please sign and date below.

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

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