



We appreciate the opportunity to work with you. This letter is to confirm our understanding of the terms of our agreement and outline the nature and extent of services we will provide. We will prepare your 2020 federal and state individual income tax returns based on the information you furnish to us. We will also prepare 2021 estimated tax vouchers, if required, based on your income and withholding taxes for 2020. Please advise us of a substantial change in income or withholding taxes for 2021.

You will provide all the information required to prepare your returns. The information you provide will be accurate and complete to the best of your knowledge. The enclosed client checklist will be completed to the best of your knowledge. You are responsible for informing us of all foreign assets owned directly or indirectly. Our work, in connection with the preparation of your income tax returns, does not include any procedures designed to discover errors or other irregularities, should any exist. We will not audit or otherwise verify the information provided, although we may ask for clarification. **You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign and file them.**

Taxpayers are required to maintain all the documents of income, deductions, credits and payments shown on the return. In addition, there are specific recordkeeping requirements for auto, meals, charitable contributions over \$250, etc. If you have any questions as to the type of records required, please ask us for clarification. Your signature on this letter confirms that we have advised you of the recordkeeping requirements.

Your returns may be selected for examination or audit by tax authorities. In the event of such governmental tax examination, we would be pleased to represent you under the terms of a separate engagement.

This engagement does not include any services not specifically identified above. We may need to perform additional accounting or research services incidental to the preparation of your tax returns. These services will be billed with your tax return, at our standard rates. You are responsible for the proper recording of transactions in the books of accounts, for the safeguarding of assets and for the substantial accuracy of the financial records.

The filing deadline for the tax returns is **April 15, 2021**. **In order to meet this filing deadline, the information needed to complete your returns must be received by our office no later than March 15, 2021.** If we receive your information after this date, we will make every effort to complete your returns without an extension, but will give priority service to clients who submitted their information on time. If an extension of time is required, any tax due with these returns must be paid with the extension. Any tax amount due, not paid by April 15, 2021, may be subject to interest and late payment penalties.

The charges for our services are based on our fee schedule and the complexity of the return.

If the information above is in accordance with your understanding, please sign below in the space indicated and return to us along with your tax information.

Accepted By:

Signature

Date

Printed Name