



2021 Individual Income Tax Engagement Letter

The Leary Group appreciates the opportunity to prepare your income tax returns this year. As you know, the IRS and other taxing authorities impose severe penalties on taxpayers and tax preparers for failure to observe due care in reporting on income tax returns.

We will prepare your 2021 federal and resident state (plus any other states at your request) individual income tax returns from information that you furnish to us. It is your responsibility to provide all the information required for the preparation of complete and accurate returns. Since it may be necessary at some point to prove the accuracy and completeness of the returns to a taxing authority, you should retain all of the documents, cancelled checks and other data relating to income and deductions. The Leary Group will deliver these original documents to you upon completion of the project, and will not retain them. The final responsibility for the income tax returns is yours, so be sure to review them carefully before you sign.

Our work in preparing your income tax returns does not include procedures designed to detect improper entries or other irregularities, should any exist. However, we will render such accounting assistance as we find necessary to prepare your income taxes properly.

FOREIGN REPORTING - Please note that any person having a financial interest in, or signature authority over, foreign bank accounts, securities, or other financial accounts having a value exceeding \$10,000 at any time during the year, must report this on their tax return. Also, having direct or indirect control over a company with foreign financial accounts. Severe and substantial civil and criminal penalties for non-disclosure may be imposed by US Department of Treasury.

PRIVACY POLICY - All providers of personal financial services are now required by law to inform their clients of their policies regarding privacy of client information. CPAs have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. Therefore, we have always protected your right to privacy. We collect nonpublic personal information about you that is provided to us by you or obtained by us with your authorization. For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, and in limited situations, to unrelated third parties who need to know that information to assist us in providing services to you. In all situations, we stress the confidential nature of information being shared.

It is possible that your returns may be selected for review by the taxing authorities. Any proposed adjustments by the agent are subject to certain rights of appeal. In the event of such an examination, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred.

Our fees will be due and payable upon the completion and prior to the e-filing of the returns.

We reserve the right to hold the completed returns until your account is paid in full. Should your return be released without full payment, a finance charge at an annual rate of 18% could be assessed on any amount not paid by the 30th of the month following the billing date. Collection costs may also be assessed in certain circumstances.

Having read and fully understood the engagement letter, I (we) agree to engage The Leary Group in accordance with the terms indicated. The information we have provided is complete and correct to the best of my (our) knowledge.

Signature (Taxpayer) / Printed Name

Date

Signature (Spouse) / Printed Name

Date