

A&G Tax Services LLC

Subject: Preparation of Your 2023 Tax Returns

Dear Tax Client,

Thank you for choosing A&G Tax Service LLC to assist you with your 2023 taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We are Financial Advisors who include tax preparation as part of our business. We are not CPAs, and our work does not include accounting services. If you are a business owner, landlord of rental property, minister with housing allowance, you are responsible for using proper software or other accounting methods to maintain good records.

Organized worksheets are provided on our website to assist you in the collection of data required for your return. Some forms are required as they help to avoid overlooking important information.

Our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. If we encounter instances of unclear tax law, or potential conflicts in the interpretation of the law, we will outline the reasonable courses of action, potential risk, and consequences.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, sign, and date below. If married, filing joint, both signatures are required.

Thank you for the opportunity to be of service to you.

Sincerely,

Lisa Greely

Lisa C Greely
A&G Tax Services LLC

Accepted By:

Taxpayer

Spouse

Date