



Engagement Letter – 2024 Tax Season

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following engagements.

We will prepare your federal and requested state income tax returns from information that you will provide. We will not audit or otherwise verify the data that you submit, although it may be necessary to ask you for clarification of some of the information.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, canceled checks and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign and file them.

To ensure that your individual tax return is completed by the due date of April 15, your **complete** information must be in our office by **FRIDAY, MARCH 1, 2024**. For information received later than **March 1, 2024** an extension will be filed if necessary and your return will be completed as soon as possible. If we file an extension, it is your responsibility to pay the tax due with the extension in order to avoid IRS penalties.

We will use professional judgment in resolving questions where the tax law is unclear or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.

The law provides various penalties that may be imposed for understatement of tax liability. Any position taken in your tax return which has a material effect and is not supported by substantial authority must be disclosed in your return.

In order to hold down the cost for preparing your return, we may not make copies of all original tax data you submit to us or keep copies of such data in our files. You should always retain the originals or copies of all original tax data you submit to us for your files.

We would like to provide you with our email addresses in case you should need to contact us or transmit tax information. No other e-mail address except info@adowningcpa.com should be used to transmit data. Sensitive documents should be sent through our secure portal.

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We are always happy to provide a tax organizer for our clients. Please call or email info@adowningcpa.com to receive a 2023 Tax Organizer.

You are required to make estimated tax payments each quarter if the amounts withheld from your salary and other sources of income do not meet your estimated tax obligations. Failure to make such payments could result in the imposition of penalties. Although we may be preparing estimated tax payment voucher for your use in making these quarterly estimated tax payments, any increases in your income during the current year may require an adjustment to your estimated tax payments. We suggest that you review your estimated tax payment each quarter to insure that they are adequate. If you would like us to assist you in this review, please notify us.

Our engagement cannot be relied upon to disclosure errors, irregularities, or illegal acts, including fraud or defalcations, that may exist.

We are available to answer your inquires on specific tax matters and to consult with you regarding income and estate tax planning. If so instructed by you, the same services may also be provided to your minor children.

TERMS

Invoices for our services will be based on time spent and will be rendered regularly and are due and payable upon receipt. Minimum fee for tax return preparation is \$600. Interest of 1% per month will be assessed on the unpaid balance if any invoice, or portion thereof, should remain unpaid for more than 30 days after the invoice date.

If this letter fairly sets forth your understanding of the terms and conditions of our engagement, please sign and date the letter in the space indicated and return this letter. Nevertheless, if you do utilize our services, we will assume that you have accepted these arrangements.

We are very pleased to have this opportunity to serve you.

Sincerely,

Alesa D. Downing, CPA, PLLC

Signature

Print Name

Date: _____

Signature

Print Name

Date: _____

**** Partnership & S-Corp Returns are due March 15th, complete business information is due to our office no later than Friday February 1, 2024, to avoid having to file an extension.**