



J & C Tax Services

3400 Bradshaw Road, Suite A-5, Sacramento, CA 95827

Phone: (916) 573-4829 Fax: (916) 857-9829

Taxpayer Name: _____ Spouse Name: _____

Taxpayer Cell Phone: _____ Spouse Cell Phone: _____

Address: _____ City, State, Zip: _____

Tax Preparation Engagement Letter

- ✓ Thank you for choosing J & C Tax Services LLC to assist you with your tax returns. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services that will be provided.
- ✓ We will prepare your federal and state income tax returns. We will depend on you to provide the information that we need to prepare and accurately complete returns. We may ask you to clarify some items, but we are not responsible to audit or verify the data you submit to us. A checklist is available on our website and in office, to help you collect the data required for your return and will help you avoid overlooking important information.
- ✓ Information you provide to us is kept confidential. We restrict access to your information and maintain physical, electronic and procedural safeguards to protect you and your information.
- ✓ Our tax preparation fee **does not** include bookkeeping, payroll, or additional consultations. Those are separate fees. Fees must be paid before your tax return is filed or delivered to you, unless otherwise agreed upon between you and your tax preparer. If you and your preparer agree to postpone payment, you will either leave a post-dated check or complete a Credit Card Authorization form dated no later than two weeks from the billing date.
- ✓ Unpaid invoices will be charged additional service fees, including a \$10.00 late fee per month, and are subject to collections after 90 days unpaid. There is a \$30.00 fee for returned payments. We reserve the right to suspend our services or to withdraw from this engagement in the event our invoice is not paid, you will be obligated to reimburse us for all costs through the date of termination.
- ✓ Your tax return will not be prepared, finalized, filed, or released until this engagement letter is signed and all required authorization forms are completed.
- ✓ If you terminate this engagement before completion of the tax return for any reason under your control, you agree to pay a proportionate fee for work completed.
- ✓ You understand that if you have an unpaid balance to J & C Tax Services and do not make satisfactory payment arrangements, your account may be placed with an external collection agency. You agree to pay all reasonable costs of collection, including the actual collection agency fee (which may be up to 35% of the unpaid balance), court costs, and reasonable attorney's fees, as permitted by law. In order for J & C Tax Services or its designated external collection agency to service your account, and where not prohibited by applicable law, you authorize J & C Tax Services and/or the collection agency to contact you by telephone at any telephone number you provide, including wireless numbers (which may result in charges to you), and to contact you by text message or email using any address you provide. Methods of contact may include the use of pre-recorded/artificial voice messages and/or an automatic dialing device, as applicable.
- ✓ Our maximum liability to you arising for any reason relating to services rendered under this letter shall be limited to the amount of fees you paid for these services. In the event of a claim relating to services under this letter, you will indemnify us from all such claims, liabilities, costs and expenses, except to the extent determined to have resulted from our intentional or deliberate misconduct.

- ✓ Fees Charged for tax return preparation does not include audit representation or preparing materials to respond to correspondence for taxing authorities. Assistance on preparing for audits and responding to correspondence will require a consultation with a **1-hour minimum**, additional fees may apply. If correspondence received is due to tax preparer error, we will provide assistance at no additional charge to you.
- ✓ It may be necessary to prepare an extension of time to file your current tax return if we do not receive **all** your tax information at least **30 days prior** to the due date of return, or when you provide your information to us without a scheduled appointment. An extension only allows additional time to file a return. It does not extend the time to pay any taxes that are due. We **will not** be responsible for any penalties or interest associated with filing after the tax deadline.
- ✓ It may be necessary to file an extension for the current year if you have a previous year tax return that you want us to prepare. Any amended returns and consultations must be done after the tax deadline.
- ✓ It may be necessary for your preparer to outsource tax preparation to another preparer due to schedules and workload. All preparers are certified to complete your tax return.
- ✓ Due to preparers' very full schedules, appointments needing to be rescheduled will likely be seen on an extension basis. We **do not** keep cancellation lists and rescheduled appointments are subject to preparer availability. Appointments cancelled without 48-hour notice or cancelled more than once are subject to a cancellation fee of \$50.00, added to your tax preparation fee and due prior to filing your return.
- ✓ If any dispute arises between or among the parties hereto, the parties agree first to try in good faith to settle the dispute through non-binding mediation.
- ✓ **You understand it is your responsibility to review your tax return carefully prior to signing e-file authorization forms to ensure that all information and deductions have been entered correctly. You understand tax returns will not be e-filed without signed authorization forms on file or this engagement letter signed.**
- ✓ We will return your original records and copies for your tax return to you at the end of this engagement. You should securely store these records, along with all supporting documentation, cancelled checks, etc. – as these items may later be needed to prove accuracy and completeness of a return. I will electronically retain copies of your records and our work papers for your engagement for 7 years, after which these documents will be destroyed/shredded.
- ✓ Our engagement to prepare your tax returns will conclude with the delivery of the completed returns to you (if paper filing), or your signature and our subsequent submittal of your tax return (if e-filing). If we are not able to e-file your returns, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax-return related documents carefully before signing them.
- ✓ To affirm that this letter correctly summarizes your understanding of the arrangements for this work, **please sign and date** the enclosed copy of this letter in the space indicated and **return it to your tax preparer**. Thank you!

We sincerely appreciate your confidence in us, please call if you have any questions.

J & C Tax Services

Date: _____

Taxpayer Signature: _____ Name (Printed): _____

Spouse Signature: _____ Name (Printed): _____