

Jill Dykes, EA
Equitable Tax Service
4208 Milton Way
Livermore, CA 94551
Phone 925-373-0153
Cell 925-373-6398
Fax 925-215-2056

TAX PREPARATION ENGAGEMENT LETTER
2022 INCOME TAX RETURNS

January 2024

Dear Client:

This letter confirms the terms of our engagement and the nature, timing and limitations of the services I provide in preparing your income tax returns.

I will prepare your 2023 federal and state personal income tax returns (and any other requested years) from the information you furnish me. Although I require copies of actual documents (W-2s, 1099s, 1098s, etc.), I will not audit or otherwise verify the data you submit. By supplying it to me you are affirming that all information is true and correct and that you have proper substantiation to support it. **Note that since you have the final responsibility for the income tax returns, you must carefully review them before you sign.**

I retain copies of your return for at least four years. After the retention period, the documents may be destroyed. I do not keep original documents; they are returned to you with the completed returns. It is your responsibility to retain your records for possible future use including possible examination by the taxing authorities.

The filing deadline for the tax returns is April 15, 2024 for most taxpayers. In order to meet this filing deadline, I must receive your complete information no later than **March 23rd**. After that I may still complete your returns by the deadline but I reserve the right to file an extension.

If an extension of time to file is required by you or me, I need your expressed approval to file the extension on your behalf. **An extension, however, only provides you with an extension to file, not an extension to pay. Taxes paid after April 15th will result in penalties and interest.**

Data for completion of your returns may be submitted in person, by mail, by fax or it may be uploaded to the secure portal. Do NOT email sensitive information, rather please request a secure link before sending. Any sensitive data emailed to me outside the portal will be your responsibility if there is a data breach.

If a joint return is prepared, both spouses must sign. From there, tax returns and copies of all supporting documentation will be made available to either spouse without the consent or notification of the other spouse.

If you send your information to me through another individual, unless you state otherwise, you are giving me permission to release your completed returns to the same person.

You are responsible for reporting foreign activities. By signing this letter, you acknowledge that you will inform me if you have income from foreign sources or if you have signature authority over any foreign account. If you are unsure whether income or an account is foreign, I can review it. **Note that the penalties for failure to report foreign activities are severe.**

Please notify me if you receive correspondence from one of the taxing authorities. I will help you determine if the assessment is accurate and what the best and proper recourse is. If your return is audited and I have made an error, I will pay any resulting penalties, as long as you provided all relevant information at the time of preparation.

My fees for tax preparation services are based on the forms required. Occasionally additional forms will be required with your filing. I will try to advise you of the fee impact of this when it is determined. All invoices are due and payable at the time the returns are completed. Tax returns will not be released or filed electronically until fees are paid. Preparation fees cover limited assistance and consultation during the year. Substantial calculations and/or discussions will require an extra fee. I may be available to assist with audits, if needed, at an additional charge.

If the foregoing fairly sets forth your understanding, please sign this letter and return it to my office with your tax documents. We cannot commence work until a signed copy of this document is returned. **If this a joint return, both spouses must sign.**

Jill Dykes, Enrolled Agent

Acknowledged: Taxpayer Signature: _____

Print name: _____ Date _____

Spouse's Signature: _____

Print name: _____ Date _____

Privacy Policy: My firm has procedures and policies in place to protect your confidential information. Access to your confidential information is restricted to those within my firm who need to know in order to provide you with services. We will not disclose your personal information to any third party without your expressed permission, except where required by law. The firm maintains physical, electronic and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.