



**M. Greenwald Associates LLP**

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*MERYL B. GREENWALD, CPA, CTC*

*MARVIN GREENWALD (1935-2013)*

**Individual Engagement Letter**

This letter is to inform you, the taxpayer, of the services we will provide and the responsibilities you have for preparation of your tax return.

**Tax Return Preparation:**

- We will prepare your 2019 federal and state income tax returns based on information you provide. Services for preparation of your return do not include auditing or verification of information provided by you.
- This engagement does not include audit or examination of your books or records, unless you purchased the **Gold** Package separately. In the event your return is audited, you will be responsible for verifying all items.
- You must review your return carefully before signing to make sure the information is accurate.
- **Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed.**
- A \$250.00 retainer is required for preparation of prior year returns.
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities **unless** you purchased a **Silver** or **Gold** Package separately.
- Fees also do not include additional time spent after your return has been delivered unless discussed in advance. This includes receiving updated tax documents and discussions regarding your tax returns.
- Any bookkeeping and research services required in order to complete your tax return will be separately billed on the invoice.
- This engagement to prepare your 2019 income tax return will terminate upon delivery of your completed returns and original documents to you. Please store your supporting documents and copies of your tax returns in a secure place for at least seven years.
- Any returns without complete tax information received by March 20<sup>th</sup> will be put on extension. We require a non-refundable deposit of \$300 for all extensions. Any return that does not have complete information in by June 15<sup>th</sup> will be charged a \$300 fee.

**Taxpayer Responsibility:**

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- M. Greenwald Associates LLP prepares returns on a first in first out basis. If documents or worksheets are requested you have 48 hours to return the information, otherwise your return goes to the back of the line.
- You affirm that all expenses or other deduction amounts are accurate, and you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You acknowledge you have completed the IRS/State Questionnaire either alone or with a member of our team.
- You affirm that if you have foreign bank accounts or online gambling you have either completed the FBAR filing requirements or given us the information to complete it for you.

**All documents must be in our office by March 20<sup>th</sup> to guarantee April 15<sup>th</sup> completion!**

**Signature(s):** By signing below, you acknowledge that you read, understand, and accept your obligations and responsibilities and that you understand our responsibilities in preparing your tax returns as explained above. By signing, you also acknowledge that you will receive our Privacy Policy with your tax return. For a joint return, we request that both parties sign and if they don't the party who signed will be completely responsible for the above on behalf of both parties. Your fee for these services will be based upon the amount of time required at standard billing rates plus out-of-pocket expenses.

I/We, hereby authorize and guarantee payment for all services rendered. In the event that my account becomes delinquent for more than thirty (30) days, I also agree to pay a finance charge of 1.75% per month on any balance due, as well as all collection agency costs, court costs, attorney fees, all not to exceed 50% of the outstanding balance as well as all interest fees accrued with the collection of this account.

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Taxpayer \_\_\_\_\_ Spouse \_\_\_\_\_ Date \_\_\_\_\_