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TO: _____

All good relationships are based upon mutual trust, understanding and effective communication. Accordingly, we feel it is in our mutual best interest to communicate our expectations of our professional relationship in order to eliminate any confusion or misunderstanding which may arise in the future.

You have requested that we prepare your **2020** federal and state income tax returns. We will prepare your **2020** tax returns based on the information you have provided us. To enable us to effectively and efficiently serve you, it is imperative that you provide us with accurate and complete information about your matter. We rely on your prompt and candid communications to keep us informed of all developments regarding any changes in the facts of your tax situation, including errors or omissions.

Our fees are based primarily on the amount of time spent on your tax return by our CPAs, accountants, assistants, and other staff, subject to certain adjustments. Each CPA, accountant, assistant, or other member of our staff has an hourly billing rate. To the extent that we can utilize our professional staff at a billing rate of \$50 - \$200 per hour in the accomplishment of any services performed for you, we will do so in order to minimize your fees. You will be billed for items incidental to the performance of services provided by our firm, such as expenses for emails, software fees, travel, postage, and phone calls. The **minimum** fee for a tax return is **\$350 per tax return**.

Invoices will be rendered at least monthly for work done in the previous month, including disbursements and other expenses incurred on your matter. If we do not hear from you regarding your invoice within thirty (30) days of the billing date, we shall assume you have examined the invoice and accept it as valid. We reserve the right to withdraw from your representation in the event of nonpayment.

As described above, our engagement is premised on an hourly fee basis. Your obligation to pay shall not depend upon a particular result or outcome on your tax return.

*All efforts to file your tax return by the tax deadline will be made. However, any data received after **Friday, March 12, 2021** could result in us filing an extension on your behalf. **October 15th** is the final deadline to file your return if a request to extend was filed. We ask that all data needed to complete your return before this deadline be in our office by **September 3, 2021**. Any returns in which data is received after 9/3/21 will be assessed a \$75 fee to cover overtime costs for staff to insure a timely filed return.*

Please be aware that your returns are subject to examination by taxing authorities, which could generate IRS or state letters or inquiries. In the event of an audit, you may be requested to produce documents, records or other evidence to substantiate income and deductions shown on your return. Please retain all of your documents, receipts, cancelled checks and any other records you might have in your possession.

In the event of a notice/audit being generated by a taxing authority, we will assist you in corresponding/representing you with the taxing authority to resolve the issues at additional fees based on the time encompassed. If the error on your return is the firm's fault, we will do this work at no charge to you, however you will be responsible for any tax, penalties or interest assessed. As part of the firm's work, we will put forth every effort to have any penalties abated.

