Subject: Preparation of Your 2023 Tax Returns

Hello Tax family! Thank you for the privilege of allowing us to provide you with tax preparation services and tax planning for 2024. We would like to make you aware of information necessary to prepare your income taxes this year. We now offer online scheduling options through our link <https://calendly.com/taxoffice420>. You can schedule a time to have a sit-down appointment, or a time to come in and drop off your documents, or even a virtual meeting.

GIACOBAZZI’S Income Tax, Inc is compliant with IRS security rules and regulations in keeping your information private and secure. In doing so we will continue to use our online secure tax portal with Drake. We will interact through an email, [noreply@securefilepro.com](about:blank), this will allow you, the client, to set up a secure online portal that you will be able to access and upload any tax documents in. We have also included the ability to electronically sign your tax return through our portal system, as well as make a payment for our services through EZ pay on Drake.

We will need a current copy of:

* Taxpayer and Spouse driver’s license
* Copy of previous 3 years return (if new to our office)
* Social security cards for everyone (if not already on file)
* Voided check for Direct Deposit
* Completed 2023 Questionnaire

We will prepare your federal and state income tax returns. We will depend on you to provide the information we need to prepare & complete an accurate returns. Our work will not include procedures to find embezzlements or other wrongdoings. Accordingly, our engagement cannot be relied upon to search for fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. If we feel unlawful activity has occurred regarding your tax return, we reserve the right to terminate this engagement. We will return your original records to you at the end of this engagement. Store these records, along with all supporting documents, in a secure location. Fees must be paid before your tax return is filed for you. Fees have increased and if working remotely we do require a deposit before we begin our work. If you terminate this engagement before completion, you agree to pay a fee for work completed. It is the client’s responsibility to inform us if they believe a conflict of interest waiver needs to be signed. We are applying a $25 charge per return for ProtectionPlus.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, sign the enclosed copy of this letter in the space indicated.

Thank you for the opportunity to be of service. If you have any questions, contact our office at 309-685-8003

Sincerely,

GIACOBAZZI’S Income Tax, Inc.

Taxpayer signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Spouse signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_