Engagement Letter for Tax Preparation Services

***GIACOBAZZI’S Income Tax, Inc***

Hello Tax Family!

We appreciate the opportunity to be of service and advising you regarding your income tax and accounting needs. To ensure a better understanding between us, we are setting forth pertinent information about the professional services we will provide and confirming our terms of service.

*Tax Work:* We will prepare your Federal and State Income Tax Returns based on the information you provide to us. We do not audit or verify the data you submitted, although there may be times when we will need clarification or additional information. It is your responsibility to provide all the information required for the preparation of complete and accurate returns and should review it carefully before signing it.

*Payment:* Our fees are based on complexity of your tax returns, research, consultations, and phone calls. If you request an estimate, we will give you a non-binding estimate based upon the information you provided regarding your tax return. The original estimate may differ from the final invoice due to unforeseen changes and circumstances. We have spent many years becoming very knowledgeable and educated in tax and accounting matters. In addition, we are required to continue our education annually to maintain our credentials with the IRS. When you contact us, it is because you need our knowledge and assistance with something, this is when our time becomes billable. If you contact us with a “general” question that we can answer quickly, we consider this a courtesy service, and you will not be billed for our time. Phone calls requiring research, business or professional planning, tax compliance, etc. will be billed in accordance with our billing policy.

*Documents:* GIACOBAZZI’S Income Tax, Inc is compliant with IRS Security Rules and Regulations in keeping information private and secure. For your convenience we will continue to use our Secure Online Portal System which you will be able to access virtually to upload tax documents, review your return, electronically sign your return, and/or make a payment for our services. When records are returned to you, it is your responsibility to retain and protect your records for possible future use. It is recommended that the client provide photocopies of all tax documents to prevent any loss of data. We are not responsible for lost originals. We are committed to the safekeeping of your confidential information and will not disclose any information without your approval as required by law.

*Additional Information:* GIACOBAZZI’S Income Tax, Inc will use our best judgement in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authority’s interpretation of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible. Upon completion of your tax return we will schedule a time to review your returns either in person, at our office, virtually, or by phone. After we have received signed copies and payment for our services your returns will be electronically filed, and you should receive a confirmation email.

If after reading this letter, you agree to the terms and conditions, please sign below. Termination of this agreement prior to completion of services may result in a final bill showing the total fees incurred for services rendered.

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