



Global Knowledge. *Local Trust.*

Dear Client:

We appreciate the opportunity to provide you with tax services. To minimize the possibility of a misunderstanding between us, we are setting forth pertinent information about the services we will perform for you.

We will prepare your federal and state (if applicable) individual income tax returns from information you provide to us. It is your responsibility to inform us if you are required to file a locality, city or school district tax return. These returns are not included with your standard tax preparation and additional fees apply.

We will not audit or otherwise verify the data you submit, although we may ask you to clarify some of the information. We ask that you provide us with copies of documents only; you are responsible for the maintenance of all personal records, including original documents.

It is your responsibility to maintain in your records the documentation necessary to support the data used in preparing your tax returns. This includes, but is not limited to, any business-related expenses and the required documents to support charitable contributions. If you have any questions as to the type of records required, please ask us for advice in that regard. It is also your responsibility to carefully examine and approve your completed tax returns before signing them or the e-file authorization. We are not responsible for the disallowance of doubtful deductions or inadequately supported documentation, nor for any resulting taxes, penalties and/or interest.

Before we can begin your tax return, we require that you complete or update the client information portion of our tax organizer. The remainder of the organizer should be completed as well; it will help you summarize the information we need in addition to alerting us as to possible issues that need further attention. A completed organizer helps keep our fee to a minimum.

We must receive all information to prepare your return by March 15 to ensure that your return will be completed by April 15. If we have not received all of your information by March 15, and your return is not completed by April 15, you may be subject to late filing or late payment penalties. WHILE WE WILL WORK DILIGENTLY TO ENSURE THAT ALL RETURNS ARE COMPLETED BY APRIL 15, WE CANNOT GUARANTEE COMPLETION OF RETURNS BY APRIL 15 WHEN INFORMATION IS RECEIVED AFTER MARCH 15.

There are circumstances that require expedited service. The details of this arrangement are determined on a case by case basis. Our fee for expedited service is \$150 per tax year required.

An extension provides additional time to file your returns, not additional time to pay any tax owed. Tax owed should be paid by April 15. Any balance paid after that date may result in assessment of penalties and interest.

We are not responsible for any penalties and/or interest incurred unless it is due to an error on our part. Likewise, we are not responsible for any penalty or interest incurred as a result of underpayment or late payment of tax. You are responsible for making timely estimates and payments, or assuring that proper withholdings are made through your employer.

Fees for our services will be at our standard rates and are due upon signing and sending back this engagement letter. No refunds will be issued once services are rendered. In addition to our base fee, additional charges *may* apply when additional forms are required to be filed with your tax return. Please see tax organizer for our updated fee schedule.

If you, the client, request in writing to disengage this firm from services agreed upon and the request is received within one calendar year of payment, it is our policy to retain a 25% administration fee in addition to any fees incurred during engagement. No refunds will be given if the request is received more than one calendar year after payment is received.

We are responsible for preparing only the returns listed above. By signing this agreement, you agree for us to contact you by phone, mail, fax, and/or email for information needed to prepare a complete and accurate tax return. You also agree to receive your completed tax return through email by a password protected document.

We provide limited support with combat zone issues as a part of our preparation. Our fee does not include responding to inquires or examination by taxing authorities, or for issues related to inaccurate or incomplete information provided to us. We are available to represent you in such matters at our standard rates.

If the above fairly sets forth your understanding, please acknowledge your acceptance in an email communication by applying your digital signature and date below. If you prefer, you may print and return a signed copy of this letter to us by email, fax, or to the address below. **WE CANNOT FINALIZE YOUR RETURN UNTIL THIS IS RECEIVED.**

We are looking forward to working with you.

Sincerely,
Palazzo & Company, LLC

Approved:

(Taxpayer Sign/Type Name)

Date

(Spouse Sign/Type Name)

Date

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