

Jonna D. Albert Accounting & Tax, LLC

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2023 Income Tax Return Annual Engagement Letter

Date: _____

Client Name(s): _____

I have read this 2023 Income Tax Return Annual Engagement Letter and agree to the contents.

Taxpayer _____ Date _____
(Signature)

Spouse _____ Date _____
(Signature)

In case of emergency, I give you permission to contact:

Name _____ Phone Number _____

Thank you for choosing **Jonna D. Albert Accounting & Tax LLC** to assist you with your **2023** taxes. This letter confirms the terms of our engagement with you, outlines the nature and extent of the services we will provide, and represents the entire agreement regarding the services described herein. The Internal Revenue Service (IRS) imposes penalties on taxpayers, and on return preparers, for failure to observe due diligence in reporting for income tax returns. In order to ensure an understanding of our mutual responsibilities, we ask all our tax clients to confirm the following arrangements.

We will prepare your **2023 Federal, Missouri, and/or Specific State(s)** _____, and **Specific City** _____ Individual Income Tax Form 1040 and related schedules from information you furnish us. We are exempted from researching and completing foreign tax returns. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. We are furnishing you with an **Organizer** to help you gather and organize the necessary information for us. By using it, you will contribute to efficient preparation of your returns and help minimize the cost of our services. **If you have taxable activity in a state other than that specifically listed, you are responsible for providing us with all information necessary to prepare any additional applicable state(s) or local income tax return. We will prepare only those state returns specifically listed above.**

We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find misuse of funds, cheating or other irregularities. Accordingly, our

engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will inform you of any material errors, fraud, or other illegal acts we discover.

The law imposes penalties when taxpayers underestimate their tax liability. Please call us if you have concerns about such penalties.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

Our fee will be based on the forms and time required at standard billing rates plus out-of-pocket expenses. Invoices are due and payable upon presentation. Our fee does not include responding to inquiries or examinations by taxing authorities or third parties, for which you may be separately billed for time and expenses involved. You agree to immediately notify us upon the receipt of any correspondence from any agency covered by this letter. **Please do not respond to or click on any links from emails purportedly from the IRS. The IRS never initiates correspondence via emails and any such emails are attempts to steal your identity.**

We will return your original records to you at the end of this engagement. You should securely store these records, along with all supporting documents, canceled checks, etc., as these items may later be needed to prove accuracy and completeness of a return. We will retain electronic copies of your records and our work papers for your engagement for seven years, after which these documents will be destroyed.

Our engagement to prepare your **2023** tax return will conclude with the delivery of the completed Federal and States Tax Returns to you (if paper filing) for your signing, and the subsequent submittal of your tax return (if e-filing). If you are required to paper file, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax return documents carefully before signing them. We will furnish you with one paper copy of your **2023** Federal and State Tax Returns at the time of signature / payment if you say you want one. We will also place a copy on your portal unless you have specifically asked us not to. **Additional fees of \$35 per copy will be required to obtain subsequent copies.**

In the interest of facilitating our services to you and to comply with new security regulations, we utilize a secure web portal to store client records. We will continue to maintain an account for you on our secure web portal and electronic access to your **2023** Federal and State Tax Returns. You will continue to have unlimited, password-protected access to your secure web portal account as long as you remain a client of Jonna Albert Accounting & Tax LLC. These portal accounts are secure and can also be used by you to store personal information that you would like to have protected and easily accessible. You would also be able to upload tax documents to us to aid in our preparation of your tax return. All confidential information sent to you or third parties (at your discretion), as well as the portal, will be password protected.

We appreciate your confidence in us and the opportunity to serve you. Please date and sign this letter to acknowledge your agreement with and acceptance of the terms of this engagement. It is our policy to initiate services after we receive the signed engagement letter.

Sincerely,

JONNA D. ALBERT

(Initial)