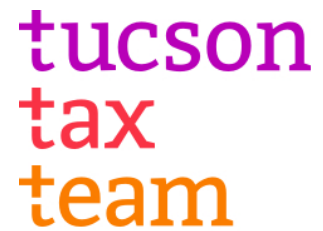


1040 Engagement Letter



Taxes solved.

Thank you for using Tucson Tax Team, LLC for your tax preparation needs. Clear communication is a key to a successful business relationship. The purpose of this letter is to ensure we share an understanding of the services we provide.

Our Responsibilities

We will prepare your Federal and State tax returns based on information you provide. Services for preparation of your return do not include auditing or verification of information provided by you.

- Tax preparation fees are based on the forms and schedules needed to complete your return. Additional charges apply for compilation of information, research of asset basis, NOLs, 1099s, FIN CEN, and other domestic and foreign reporting forms.
- Preparation fees cover limited assistance and consultation during the year; they do not include audit representation, preparing materials to respond to correspondence from taxing authorities, amendments, or complex tax projections.
- Information you provide will be kept confidential. However, our discussions are not protected by any form of attorney-client privilege. We cannot ignore the implications of any information you provide in the process of preparing your return. If you file a joint return, there is no privacy for or from your spouse in regard to our tax services.
- We do not guarantee that the IRS or state taxing authority will timely accept your tax return if filed within 5 days of the filing deadline.
- Occasionally we make mistakes; please let us know if you received any letters from the government. We correct returns at no cost if we are at fault, provided we are notified immediately of any error. We are not responsible for paying any additional tax owed.

Taxpayer's Responsibilities – please initial each sentence.

- ☐ You agree to provide us all income and deductible expense information.
- ☐ You agree that you have written records of all items included on your return in the event of an audit by the IRS or state taxing authority. We recommend you keep proof of deductions for a minimum of 7 years.
- ☐ You understand that signing the tax return constitutes your agreement with it.
- ☐ Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay \$250 per hour for work completed. In some situations, a retainer may be required.
- ☐ Some forms must be paper filed with taxing authorities; it is your responsibility to have any mailings tracked to ensure proof of timely receipt.
- ☐ You understand that we will automatically file an extension for you if all information needed to complete your return has not been received by us by April 1st.
- ☐ You understand that documentation is kept on the portal for no longer than one year; it is your responsibility to download any portal information you need before we remove it.
- ☐ You understand that we will provide simple tax planning at no additional cost between May and October; complex tax planning and any tax planning required after November 1st will be billed at our discounted hourly rate of \$150 per hour, minimum charge ½ hour.

I am receiving your monthly newsletter.

Tax Questions:**YES****NO**

- ☐ I/we owned a foreign bank, retirement account, or received a foreign inheritance/gift, or had other foreign interests. I had signature authority over a foreign bank account.
- ☐ I/we received, sold, sent, exchanged, or otherwise disposed of virtual currency/digital assets during the year.
- ☐ I/we purchased or sold real estate during the year.
- ☐ I/we had health insurance through the Affordable Care Act. Send 1095-A
- ☐ I/we made estimated tax payments by check or online.
- ☐ I/we gave a gift in cash/property or forgave a loan of \$17,000 or more per individual during the year.
- ☐ I/we have or want to contribute to a retirement account other than through my employer.
- ☐ Did you purchase an EV auto or install solar or energy efficient property?
- ☐ Do you have an LLC (either active or inactive)? If yes, you have additional reporting requirements for 2024.

Please select from the following:

Write/receive checks Direct deposit/debit Apply to next year

If I owe tax:

For refunds:

Direct Deposit of Refund or Debit for Payment of Tax – we do not keep or reuse prior year information. We will not direct deposit a refund without the below information or a voided check.

Routing # _____ Account # _____

Signatures

By signing below, you acknowledge that you understand and accept your obligations and responsibilities and you certify that the bank information provided above is correct. This agreement is in effect for calendar year 2023 unless and until canceled by either party in writing.

_____ Taxpayer Signature	_____ Date	_____ Spouse Signature (if joint return)	_____ Date
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Print Last Name

Print Last Name

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