**Engagement Letter for Tax Preparation Services**

Integrity Business Solutions, Inc.

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Dear Valued Client:

This letter confirms the terms of our tax engagement and clarifies the nature and extent of the professional services that we will provide.

**The Internal Revenue Service imposes penalties on taxpayers, and upon us as 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 clients for whom we prepare tax returns to confirm the following arrangements.**

**Preparation:** We will prepare your individual/business/entity tax returns solely for the period(s) you provide us with specific information. We will not audit or otherwise verify the data you submit, although we may ask you to clarify some of it for us. We will render such bookkeeping assistance as we find necessary for the preparation of the income tax returns at an additional charge when necessary to properly prepare the return. Our work does not include any procedures designed to discover defalcations or other irregularities, such as fraud or embezzlement, should any exist.

The client agrees to furnish all information that is necessary for the preparation of the above tax returns and is responsible for the proper recording of transactions in the books of accounts, for the safeguarding of assets, and for the substantial accuracy of the financial records. The client is also responsible for maintaining sufficient documentation to substantiate all items of income and deduction claimed, including travel and entertainment expenses. It is recommended that the client provide photocopies of all tax documents to prevent any loss of data Integrity Business Solutions, Inc. will not be responsible for lost originals. Integrity Business Solutions, Inc. conducts business via the U.S. Postal Service unless the client requests otherwise, and will not be responsible for any lost or stolen documents.

As a general rule, we require that all information be provided to us at the time of your selected appointment/ walk-in / drop-off services etc. if you expect us to deliver your tax return(s) in a timely manner. Be aware that if you submit your data after the date requested, we may not be able to keep our commitment in term of delivery. Although we will endeavor to extend the due date of your tax return(s) if they are not done by the tax filing deadline, ultimately you may be subject to late filing penalties because of the delay.

**Fees & Payment**: Our fees for this work will be based upon the complexity of your tax return(s), as well as out-of-pocket costs and processing and handling fees. Tax preparation charges are based on standard rates which range from Form 1040 priced at $265.00 upwards, contingent upon additional forms/schedules required to prepare. Because unforeseen or changed circumstances might affect this original fee estimate, your actual fees may exceed the original fee estimate without notification to you in advance.

Integrity Business Solutions, Inc. reserves the right to ask for a retainer, based on the estimated price of the tax return. If a retainer is not requested, invoices for services are due when rendered and interim billings may be submitted as work progresses. If you intend to pay by check, we will require payment upon signing of this letter. If you pay by check, your return will not be transmitted electronically nor given to you to mail until seven days after the receipt of your check.

We respectfully request payment at the time services are rendered unless payment is coming directly from your refunded amount. Once your return is complete and submitted based on payment directly out of your refund amount, if for any reason your income tax refund is retained by the IRS or NYS for balances owed to them you will be billed for the cost. In the event that any balance is past due, we reserve the right to cease working on your return(s) or providing any other services until the balance has been paid in full. If you have a balance on your account after 30 days, there will be a late fee of 1.5% added to the second billing and on each monthly statement thereafter. At any time after the second billing, your account may be sent to collections. You will be responsible for any court costs, attorneys’ fees and any costs associated with collections.

**Liability:** You agree that Integrity Business Solutions, Inc. liability hereunder for damages, unless caused by our gross negligence or willful misconduct, shall not exceed the total amount paid for the services described herein. This shall be your exclusive remedy. If you should receive a notice from a taxing authority, you must send a copy within 30 days of the date on the first notice (phone calls are not acceptable).

**Document Retention:** It is our policy to retain work papers related to this engagement for seven years. Upon the expiration of the three-year period, you agree that we shall be free to destroy our work papers. When records are returned to you, it is your responsibility to retain and protect your records for possible future use, including potential examination by any government or regulatory agencies. You should retain the

tax records related to the current year’s tax returns, including any receipts, statements or other supporting documentation, for at least three years after it was filed, since any additional assessments are usually made during this period. Once your return(s) are completed, you will be given a copy for your records. There is a minimum charge of $40.00 for the time and efforts involved in providing you with additional copies of your tax returns, so please retain the copies you receive from us.

**Privacy Notice:** As your service provider, we collect information provided by you from your tax organizer, worksheets, documents, computer data files and discussions, information provided to us at your request by brokerage houses and banks, and information that we develop as part of the engagement. We are committed to the safekeeping of your confidential information and we maintain physical and electronic safeguards to protect your information. We are required to keep all information about our engagement confidential. If you would like your records released to a third party, such as a mortgage lender you must sign a disclosure statement. Please fax us your signed authorization to release the information to (718)798-0584. There is a minimum charge of $40.00 for the time and efforts involved in providing your information to a third party.

We want to express our appreciation for this opportunity to work with you, and hope that you’ll bring any questions or concerns to our attention.

Gerard L. Hutchins, EA.

Accepted By:

Date: