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## TAX PREPARATION AND CONSENT TO DISCLOSURE LETTER

Dear Business Owner,

Thank you for choosing **The Tax Office Inc.** for your **2024** business tax preparation. This letter outlines the terms of our engagement and the services we will provide.

### Services Provided

We will prepare your **2024 federal and state business tax returns** based on the information you provide. While we may request clarification, we will not audit or verify the data. We will obtain electronic copies of **all** documents for our records.

- We will provide accounting services **only as needed** to prepare your business tax return, billed at **\$150 per hour**.
- Our services **do not include identifying defalcations or irregularities**. We will notify you of any material issues that could affect the accuracy of your business return.

### Penalties & Tax Law Interpretation

- **The law imposes penalties when taxpayers underestimate their tax liability.** Let us know if you have concerns about such penalties.
- If unclear tax laws or conflicts arise, we will outline the possible actions and their risks, and **you** will decide how to proceed.

**INVOICES ARE DUE AND PAYABLE UPON PRESENTATION.**

### Record Retention & Filing

- We will return your original records at the end of our engagement and retain copies for 3 years. Please keep your records in a secure place for at least 7 years.
- If you do not select e-filing, **you** are responsible for filing your returns. **Review all documents carefully** before signing.

Initials for Engagement (Business Owner / Taxpayer): \_\_\_\_\_

(By initialing, you agree to the terms of this engagement and services outlined above.)

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Checking your bottom line.

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## Consent to Disclosure of Tax Return Information

We will not disclose your business tax return information to third parties unless required by law or with your consent. If you **do not** sign this consent form, **we will prepare your return manually**, which may take more time and result in a **higher fee**. We would not be able to use tax software, and we would not be able to electronically file your tax returns, rather, they would have to be **mailed in by you**.

Without your consent, you will **not** have access to the client portal, and **your returns will not be e-filed**.

**Please check each box that pertains to your tax situation:**

- Thompson Reuters Ultra Tax (Tax software used to prepare and E-File your tax return)
- ATOM – Secure Client Management Software & Secure Portal
- QuickBooks Desktop and/or QuickBooks Online

Initials for Engagement (Business Owner / Taxpayer): \_\_\_\_\_

(By initialing, you agree to the terms of this engagement and services outlined above.)

Taxpayer Name: \_\_\_\_\_

Taxpayer Signature: \_\_\_\_\_

Business Name: \_\_\_\_\_ Title: \_\_\_\_\_

Date Signed: \_\_\_\_\_

**Valid Until: 12/31/2025**

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone 1-800-366-4484, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

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Checking your bottom line.

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