
TAX PREPARATION AND CONSENT TO DISCLOSURE LETTER

Dear Client(s),

Thank you for choosing **The Tax Office Inc.** for your **2024** 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 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 tax returns, 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 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 (Taxpayer): _____ (Spouse): _____

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

Checking your bottom line.

Consent to Disclosure of Tax Return Information

We will not disclose your 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.**

If you consent, your tax return information may be disclosed to the following entities:

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

Initials for Consent to Disclosure (Taxpayer): _____ (Spouse): _____

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

Taxpayer Name: _____ Spouse Name: _____

Taxpayer Signature: _____ Spouse Signature: _____

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.

Checking your bottom line.
