

Client Name: \_\_\_\_\_

Re: Letter of Engagement

Dear Client(s),

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements.

We will prepare your 2021 federal and state income tax returns from information which you will furnish to us. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. We will furnish you with questionnaires and worksheets to guide you in gathering the necessary information. Your use of such forms will assist in keeping the fee to a minimum.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, cancelled checks and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them.

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations and/or irregularities, should any exist. We will render such accounting and bookkeeping assistance as determined to be necessary for preparation of the income tax returns.

The law provides various penalties that may be imposed when taxpayers understate their tax liability. If you would like information on the amount or the circumstances of these penalties, please contact us.

Your returns may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred.

Our fee for these services will be based upon the amount of time required at standard billing rates plus out-of-pocket expenses. All invoices are due and payable upon presentation.

If the foregoing fairly sets forth your understanding, please sign this letter in the space indicated and return it to our office. However, if there are other tax returns you expect us to prepare, please inform us by noting so at the end of the return copy of this letter.

We want to express our appreciation for this opportunity to work with you.

Very truly yours,

**The Tax Office, Inc.**

Accepted By: \_\_\_\_\_  
Tax Payer

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

Accepted By: \_\_\_\_\_  
Spouse (when applicable)

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

**CONSENT TO DISCLOSURE OF TAX RETURN INFORMATION**

Federal law requires this consent form be provided to you to engage in our tax preparation services. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form. Because our ability to disclose your tax return information to another tax return preparer affects the tax preparation services that we provide to you and its cost, we may decline to provide you with tax preparation services or change the terms (including the cost) of tax preparation services that we provide to you, if you do not sign this form. If you agree to the disclosure of your tax return information, your consent is valid for one year from the date of signature.

We, The Tax Office Inc., a U.S. – based firm may disclose your 2021 tax return information to the entities listed below. The information disclosed may include information furnished to or in connection with the preparation of your tax return(s); information derived or generated by The Tax Office Inc. from the information furnished; and/or tax return information associated with prior years’ returns in the possession of The Tax Office Inc. The information disclosed may also include all information contained within your tax return(s); if you wish to request a more limited disclosure of your tax return information, you must inform The Tax Office Inc.

If you agree to allow The Tax Office Inc. to disclose your tax return information to the entities listed below, please print, sign and date this consent to the disclosure of your 2021 tax return information.

I (We), authorize the Tax Office Inc. to disclose to the following, my 2021 tax return information:

- Thompson Reuters Ultra Tax (Tax Software)**
- ATOM – Secure Client Management Software & Secure Portal**

Tax Payer Name: \_\_\_\_\_  
(PLEASE PRINT)

Spouse Name: \_\_\_\_\_  
(PLEASE PRINT)

\_\_\_\_\_  
Tax Payer Signature

\_\_\_\_\_  
Spouse Signature

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

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

Consent Valid Until: **12/31/2022**

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).

Please feel free to contact us at 602-547-0520 if you have any questions or would like more information regarding our privacy and confidentiality policies and procedures.