

Dear Client(s),

Thank you for choosing **The Tax Office Inc.** to assist you with your tax preparation. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your **2023** federal and state income tax returns. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. We will obtain electronic copies of **all** your data that is to be used to prepare your tax return for our records.

We will perform accounting services, only as needed, to prepare your tax returns. The fee for accounting services is \$225 per hour. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will inform you of any material errors, fraud, or other illegal acts we discover.

The law imposes penalties when taxpayers underestimate their tax liability. Let us know if you have concerns about such penalties.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

Invoices are due and payable upon presentation. All accounts not paid within thirty (30) days are subject to interest charges to the extent permitted by state law.

We will return your original records to you at the end of this engagement. We retain copies of your records and our work papers from your engagement for 3 years, after which these documents will be destroyed. We advise that you store these records, along with all supporting documents, in a secure location for 7 years.

If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them. Our engagement to prepare your **2023** tax returns will conclude with the delivery of the completed returns to you, or with e-filed returns, with your signature and our subsequent submittal of your tax return.

Taxpayer Signature

Date

Spouse Signature

Date

Valid Until: 12/31/2024

Checking your bottom line.

CONSENT TO DISCLOSURE OF TAX RETURN INFORMATION

Unless authorized by law (ex. a court order or an Internal Revenue Service audit), 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.

By **not** signing the consent form, we could only prepare your tax return by hand. You would not have access to the client portal. Preparing the tax return by hand means we would have to download each form separately from the IRS and physically write in all the information. 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**. There is far more time involved in preparing a tax return without the use of software; therefore, the tax preparation fee could be 2-3 times more than if we were able to use software.

We, **The Tax Office Inc.**, a U.S. – based firm may disclose your 2023 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.**

To affirm that this letter correctly summarizes your understanding of the arrangements for this work and 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 2023 tax return information.

If you agree to the disclosure of your tax return information, your consent is valid until the date listed below.

I (We), understand the arrangements discussed in this letter and I (We), authorize the Tax Office Inc. to disclose to the following, my 2023 tax return information:

- Thompson Reuters Ultra Tax (Tax software used to prepare and E-File your tax return)
- 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: 12/31/2024

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.