

2018 Engagement Letter

Thank you for choosing Norma’s Tax Service to assist with your taxes; we are pleased to serve you in 2019. We continually look for ways to serve you better and give you a quality experience. 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 **2018** federal and state income tax returns only. Other tax obligations are your responsibility and not covered under this engagement. We will depend on you to provide the information we need to prepare complete and accurate returns. A questionnaire and other documents are provided for specific information. Completing these forms will assist us in making sure you are well served for a reasonable fee. You represent that the information you are supplying to us is accurate and complete to the best of your knowledge and that you have disclosed all relevant facts affecting the returns. We will not verify the information you give us; however, we may ask for additional clarification of some information. An Organizer is available, at your request to help you collect the data required for your return.

We will perform limited accounting services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations or other irregularities. Personal expenses should not be included in business expense deductions. 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, of course, inform you of any material errors, fraud, or other illegal acts we discover.

By signing below I authorize my tax preparer to use my tax calculations to answer any questions I have. In addition The IRS permits you to authorize us to discuss, on a limited basis, aspects of your return for up to one year after the return’s due date. Your consent to such discussion is authorized by your signature as part of this engagement.

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

Our fees are due and payable upon presentation. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (30) days.

We will return your original records to you at the end of this engagement. You should securely store these records, along with all supporting documents, canceled checks, etc., as these items may later be needed to prove accuracy and completeness of a return. We will retain copies of your records and our work papers for your engagement for five years, after which these documents will be destroyed.

Our engagement to prepare your 2018 tax returns will conclude with your signature and our subsequent submittal of your tax return (if e-filing) or with the delivery of the completed returns to you (if paper-filing). You have the final responsibility for the income tax returns. You should review them carefully before you sign them. If you have not selected to e-file your returns with our office, or we are unable to e-file your returns you will be solely responsible to file the returns with the appropriate taxing authorities.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign and date this letter in the space indicated and return to us. A copy is available to you upon your request. We want to express our appreciation for this opportunity to work with you.

Sincerely,
The Staff of Norma’s Tax Service

Accepted by:

_____	_____	_____	_____
Taxpayer	Date	Spouse	Date