

# KENNETH L. THOMET, CPA PLLC

## General Engagement Letter for 2019 Tax Return Preparation

*This letter is to inform you, the taxpayer, of the services we will provide you, and the responsibilities you have for preparation of your tax return.*

### **Tax Return Preparation**

- We will prepare your **2019** federal and applicable state tax returns based on information you provide. This engagement of services is for preparing your return does not include auditing or verification of information provided by you.
- In the event your return is audited, you will be responsible for providing and verifying the items reported. If our assistance is needed **additional fees** will be assessed.
- You need to review the return carefully before signing to make sure all information is correct.
- The tax return preparation fee does not include bookkeeping. Please organize your information and give total amounts. You will be charged for compiling numbers and receipts.
- Fees must be paid before your tax return is filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer maybe required for preparation.
- Fees charged for tax return preparation **do not include** audit representation or preparing materials to respond to correspondence from taxing authorities.
- The law also imposes penalties when taxpayers understate their tax liability. If you have concerns about such penalties, please consult with us. **\*\*An Extension of time IS NOT an extension to pay.\*\***
- The engagement to prepare your 2019 tax returns terminates upon delivery of your completed returns and original documents to you. Please store your supporting documents and copies of your tax returns in a secure place for at least four years from the date of filing.

### **Taxpayer Responsibilities**

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You will review your tax return for changes to direct deposit accounts and addresses. We are not responsible for incorrect or out of date information.
- You are responsible for ensuring all personal expenses are segregated from business expenses.

***Were all individuals on the tax return Taxpayer, Spouse and/or dependents covered by health insurance all year? If you had Marketplace Insurance a 1095-A must be presented. Yes  No***

***Did you have foreign accounts which exceeded \$10,000 in value at any during 2018? Yes  No***

***May we contact you by text? Yes  No  Paper or PDF copy of your return? Paper  PDF***

***ALL INFORMATION TO COMPLETE YOUR RETURN MUST BE RECEIVED BY MARCH 23<sup>RD</sup>.***

***Any changes to: Address? Dependents? New dependents? Email? Phone Number? Please provide information below on the line.***

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***By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities and that you understand our responsibilities in preparing your tax returns as explained above***

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*Taxpayer / Spouse*

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*Date*

***\*\*\* Driver's License copy of taxpayer and spouse Required \*\*\****

*Identification matching*