



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

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

Thank you for choosing Todd's Tax Service LLC to prepare your 2020 tax return(s). 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 federal and state income tax returns. We will depend on you to provide the information we need to prepare complete and accurate returns. Please use our checklist to help insure that you provide us all of the information we need to prepare your returns. **There is a minimum charge of \$75 to amend your tax returns after you file the original returns.**

The law imposes penalties when taxpayers underestimate their tax liability. Please call us 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.

Fees for most types of returns are fixed according to a fee schedule tied to your filing status. A copy of the fee schedule is available upon request. Our fees do vary from client to client and from situation to situation based upon the complexity of the returns prepared, the level of organization of the client, and the amount of time we spend on preparing your return(s), reviewing the returns with you, and answering your questions and addressing your concerns.

**Our liability in the unlikely event of an error on your return(s) is limited to the amount paid for tax preparation services.** You will be responsible for any tax, penalty, and interest associated with such error. Tax preparation fees are non-refundable. We are not responsible for overdraft fees associated with a rejected debit of our tax prep fee.

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 seven years, after which these documents will be destroyed.

Our engagement to prepare your tax returns will conclude with the delivery of the completed returns to you (if paper filing) or your signing, and the subsequent submittal, of your tax return (if e-filing). Review all tax-return documents carefully before signing them. ***We encourage you to contact us if something unusual happens during the year so we can advise you accordingly.***



*Our fee includes assistance in responding to notices you may receive from the IRS or State authorities regarding your tax returns. Additionally, we will assist you at no charge in most cases if you are audited. This part of our service will only apply if you have records to substantiate the items on your tax returns and cooperate with us during any audit or inquiry.*

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign this letter in the space indicated.

Todd's Tax Service LLC does not provide investment advice. In discussions of your tax and financial situation, investment related issues and questions can arise. Any opinions expressed are not to be construed as investment advice. Always consult with an appropriately licensed financial advisor prior to making investment decisions.

Todd's Tax Service LLC does not sell insurance. In discussions of your tax and financial situation, insurance related issues and questions can arise. Any opinions expressed are not to be construed as insurance advice. Always consult with a licensed insurance agent in following up on these issues.

Todd's Tax Service LLC does not offer legal advice. In discussions of your tax and financial situation, legal issues occasionally arise. We will highlight the tax implications of certain legal issues. Always consult with a licensed attorney to ensure your legal needs are addressed and implemented

We appreciate your confidence in us. Please call or email if you have questions.

Sincerely,

Todd Fogelberg, Enrolled Agent

(Both spouses must sign for preparation of joint returns.)

Accepted By:

\_\_\_\_\_  
Taxpayer

\_\_\_\_\_  
Spouse

\_\_\_\_\_  
Date

PRIVACY POLICY



### Fee Addendum for New Clients

A minimum charge of \$100 will be assessed to new clients who start tax preparation with Todd's Tax Service LLC and withdraw from the engagement for any reason prior to efilng and paying for the completed returns. Please initial to confirm your understanding of this new policy which applies only to new clients. You agree to pay Todd's Tax Service LLC \$100 at the time you withdraw from our tax preparation engagement. You also agree to pay collection (legal) costs not to exceed \$500 in connection with collection of this non-refundable fee. This fee is due and payable at the time you withdraw from the engagement if you do not efile and pay for completed returns. Taxpayer \_\_\_\_\_ Spouse \_\_\_\_\_

We collect nonpublic personal information about you from various sources, including the following:

- \*Information we receive from interviews regarding your tax situation;
- \*Information we receive on applications, organizers, or by other means, such as your name, address, telephone number, social security number, dependents, income, and other tax-related data; and
- \*Information from tax-related documents you provide that are required to process tax returns, such as Forms W-2, 1099R, 1099-INT, 1099-DIV, and stock transactions, etc.

We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as requested by our clients or as required by law.

We restrict access to nonpublic personal information concerning you. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your nonpublic personal information.

**We will not call, email, or send you U.S. Mail unless you contact us first.**