

Connie's Accounting Service, Inc.
Income Tax Engagement Letter
For tax year 2023

Dear Client,

Thank you for choosing Connie's Accounting Service, Inc. to assist you with your Income Taxes. This letter confirms the terms of my engagement with you and outlines the nature and extent of the services I will provide.

I am required by law to file most income tax returns electronically. If your return cannot be filed electronically, or you request a waiver from the electronic filing requirement, I may require your approval and signature on a waiver document. In this case, I will supply you with paper copies and envelopes for sending to the appropriate Federal and State agencies.

I will prepare your returns based on information you provide. **You agree that you will provide all requested documents, have included all income, and answered all questions truthfully and fully so I can accurately prepare your returns.** Preparation of your tax returns does not imply any verification or other assurances related to the information you provide, and I will not perform any auditing functions related to this engagement. You acknowledge that it is your responsibility to provide any and all documentation and verification of items on your returns in the case of an audit or other inquiry from a government agency. Note that some items such as auto expenses, travel expenses, and certain charitable contributions require contemporaneous written records to allow a deduction.

I 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. I will retain copies of your records and my work papers for your engagement for three years, after which these documents will be destroyed.

Invoices are due and payable upon presentation. Unless other arrangements have been made in advance, I will require full payment before I can file your returns.

Information you provide will be kept confidential. However, our discussions are not protected by any form of attorney-client privilege. I will advise you to consult with an attorney at any time I feel it may be appropriate.

This agreement covers only the preparation of your tax return and does not apply to services related to an audit of the return by a government agency, additional correspondence with a government agency, or other services that may be required after the filing of your returns. If additional services are required, a separate agreement will be executed.

Assisting you with your compliance with the Corporate Transparency Act (CTA), including beneficial ownership information (BOI) reporting is NOT within the scope of this engagement. You have sole responsibility for your compliance with the CTA including its BOI reporting requirements and the collection of relevant ownership information. I have no liability resulting from your failure to comply with CTA. Information regarding the BOI reporting requirements can be found at www.fincen.gov/boi.

Sincerely,

Connie Bockhorst, EA

Connie Bockhorst, EA

1 At any time during the tax year, did you: (a) receive (as a reward, award, or payment for property or services); or sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? Yes ☐ No ☐

Do you and/or your spouse have **any foreign financial accounts, trusts or partnerships**? Yes ☐ No ☐

2 If yes, did the aggregate value of all foreign financial accounts exceed \$10,000 at any time during the calendar year? Yes ☐ No ☐

I (we) have read and agree to the terms of this agreement:

Client Signature

Printed Name

Spouse Signature

Printed Name