

Connie's Accounting Service, Inc.

Income Tax Engagement Letter

For tax year: _____

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 and answer 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.

Sincerely,

Connie Bockhorst, EA

At any time during the tax year, did you receive, sell, send, exchange, or otherwise acquire any financial interest in **any virtual currency**? Yes No

Do you and/or your spouse have **any foreign financial accounts, trusts or partnerships**? Yes No
If yes, did the aggregate value of all foreign financial accounts exceed \$10,000 at any time during the calendar year?
Yes No

What are the amounts of the Economic Impact Payments you received from the government? 1st: _____
2nd: _____

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

_____ date _____ date _____
Client Signature Spouse Signature

_____ Printed Name _____ Printed Name