

Rachel Lewis, E.A. BOOKKEEPING & TAX

This letter is to confirm and specify the terms of our engagement with you for the year ended 2023 and to clarify the nature and extent of the services I will provide. I will prepare your 2023 Federal and applicable state income tax returns from the information you provide. This engagement does not include representation should your tax return be selected for examination by a taxing authority or handling of notices from tax agencies. All of these additional services are available upon request.

By signing this letter you represent that the information you supply to me is accurate and complete to the best of your knowledge and that you have disclosed to me all relevant facts affecting the returns. I will not audit or make other verifications of the data you submit, although it may be necessary to ask for clarification of certain items. I will furnish you with questionnaires and/or worksheets to guide you in gathering the necessary information.

It is your responsibility to provide all of the information required to prepare complete and accurate income tax returns. You should retain all the documents, cancelled checks and the data that form the basis of your income and deductions. These documents may be necessary to prove the accuracy and completeness if the returns are examined by a taxing authority. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before signing them.

My work on the income tax returns does not include any procedures designed to discover defalcations or irregularities, should any exist. I may render such accounting and bookkeeping assistance as determined to be necessary for the preparation of the income tax returns. However, should extensive accounting or bookkeeping be required, I will contact you to determine if you would like to do it yourself or hire me, for an additional, agreed upon fee, to do it for you.

I will use professional judgment in resolving questions where tax law is unclear or where there may be conflicts between taxing authorities' interpretations of the law and other supportable positions. Unless otherwise instructed by you, I will resolve such questions in your favor wherever possible.

Certain communications (but not all) involving tax advice may be privileged and not subject to disclosure to the IRS. By disclosing the contents of those communications to anyone, or by turning over information about those communications to the government, you may be waiving that privilege. To protect your right to privileged communication, please consult with me or your attorney prior to disclosing any information about your tax advice.

I prepare the tax returns solely for filing with the Internal Revenue Service (IRS) and state and local tax authorities. They are not intended to benefit or influence any third party, either to obtain credit or for any other purpose. As a result, you agree to indemnify and hold me and any partners, principals, shareholders, officers, directors, members, employees, agents or assignees harmless from any and all claims arising from the use of the tax returns for any purpose other than filing with the IRS and state and local tax authorities, regardless of the nature of the claim, including the negligence of any party.

Under normal practices, I retain work papers and copies of client records obtained in the course of this engagement for 5 years. Unless you request otherwise in writing, I may destroy those work papers and records after the expiration of that time. If you do not make such a request in a timely fashion, you agree that you shall not thereafter assert any claim, the resolution of which would have been materially aided with those work papers or records.

If the foregoing fairly sets forth our understanding, please sign and return this letter.

I look forward to working with you.

Sincerely,
Rachel Lewis, EA
Enrolled to practice before the IRS

Accepted by: _____ Date: _____ Phone: _____
Client

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