



TAX + BUSINESS SERVICES

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Client Engagement Letter

Dear Tax Plus Client:

Thank you for selecting Tax Plus to assist you in preparing your Federal and State income tax returns. This letter confirms the terms of our engagement and the nature, timing and limitations of the services we will provide.

We will prepare your 2022 income tax returns from information you furnish us. We will not verify the data you submit for accuracy although it may be necessary to ask additional questions for clarification. We will furnish you with tax organizers to guide you in gathering the necessary information. Your use of such forms will help to optimize the efficiency of your appointment.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. We will scan original documents and keep them in our secured electronic file cabinet and return all original documents to you. Please retain all documents, cancelled checks and other data that form the basis of income and deductions as these may be necessary to prove the accuracy and completeness of the returns if audited. If there are pending or missing items at the time of filing it is your responsibility to get any missing documentation or information to us so that we may timely file your returns. **You have the final responsibility for the income tax returns and, therefore, you should review them carefully before signing.**

In recognition of the relative risk and benefits of this agreement, the client agrees to limit the liability of Tax Plus up to the total fee rendered for tax preparation services.

Our fees for tax preparation services are based upon the complexity of your returns and the required forms. All invoices are due and payable upon presentation. Tax returns will not be filed electronically until fees are paid.

City of Los Angeles and other city business filings are due by **Tuesday February 28th, 2023**. The S-Corporation's filing deadline is **Wednesday March 15th, 2023**. The individual tax filing deadline is **Tuesday, April 18, 2023**. If an extension of time to file is required, we will need your express approval prior to the original deadline.

If the foregoing fairly sets forth your understanding, please sign below in the space indicated and return it to our office.

We want to express our appreciation for this opportunity to work with you.

Very truly yours,

Tax Plus

Client Signature

Client Name

Date

Spouse Signature

Spouse Name

Date