



Engagement Letter for Tax Return Services

Date:

Client Name:

Address:

City, State, Zip:

Thank you for your interest in using **Zen Tax Accounting Services, Inc.** for our tax return planning and preparation services. In order to minimize any possible misunderstandings as to the scope of the work that you want us to do for you and the payment for such services, this **Engagement Letter For Tax Return Services** confirms the engagement, sets forth our understanding regarding the assignment and constitutes our agreement as to the scope of the services and the fees for our services. Please be sure that this letter reflects accurately your expectations before signing.

You have asked us to:

1. _____
2. _____
3. _____
4. _____

Tax Return Preparation

Should you choose to elect the use of Zen Tax Accounting Services current year tax preparation services, our general guidelines for the preparation is discussed below:

We will prepare your income tax returns from the data you provide using our affiliated team of CPAs and tax professionals at Gradient Tax, LLC to complete your tax returns. You will review the returns before signing, mailing, or authorizing transmission of them to your respective state or the Federal government. Our services are subject to your furnishing adequate documentation for the current year and providing a copy of the prior year's tax return if we did not prepare it. Returns are prepared on the basis of information supplied by you without independent verification by us. We assume that you have all supporting documentation for all income and deductions. You should retain said documents for a minimum period of three years. (*Supporting documents include but are not limited to paychecks, receipts, daily diaries, appointment books, calendars, automobile mileage logs, entertainment records, credit card records, investment records, records reflecting the cost of goods given to charities, real estate records, etc.*)

Because of the complexity of the tax code and the frequent changes in the tax law, we may need to devote some time to search through various reference sources to find answers to questions about various tax issues that are pertinent to the questions you may have asked in 1 through 3 above. Before we start any research on any of those areas of concern to you, we will give you an estimate of the additional costs involved over and above our scheduled rates. We will also provide you with suggestions and contact information regarding any tax professionals who are known to be specialists in the subject area. If assistance is provided by other professionals, you will need to engage the services of that individual under a separate agreement.

This agreement includes and incorporates the enclosed **Client Disclaimer Memorandum** which describes the types of services we provide.

In order to provide the assistance you have requested, we will need the following information from you.

- ___ A complete copy of your last year's personal tax return
- ___ A complete copy of your last year's business tax return, if applicable
- ___ A complete copy of any information returns you have received for the tax year
- ___ An original copy of any W-2 forms
- ___ An original copy of any 1099 forms.
- ___ A completed client questionnaire.
- ___ Fees for your return will be due upon completion and delivery to you

You will be responsible for signing the return, for the payment of any taxes and late payment penalties, if any, and for the delivery of the returns (with your signature) to the appropriate mailing address of the tax authority, unless you have us electronically file your return on your behalf. We will obtain your authorization to do so on the appropriate IRS form.

We charge clients a set fee for the preparation of various individual tax forms and schedules, plus additional fees for any required research that you may ask us to do on the subjects listed earlier in this agreement.

Our affiliated team of CPAs and tax professionals will provide the most accurate and most favorable results that we can; however, we can not guarantee any specific outcome. If your return is selected for audit or for verification by the IRS or your state authority, our services to help you respond to these inquiries will constitute a separate engagement and will include separate charges. All returns are subject to review by taxing authorities. You may request assistance in connection with inquiries, examinations or any subsequent assessment. You agree to inform us before we accept the additional engagement, of any correspondence from any taxing authority. You also agree to inform us promptly of any correspondence from any taxing authority regarding any returns we have prepared.

The enclosed **Client Disclaimer Memorandum** provides information that might be pertinent to your decision as to whether you wish to retain us as your tax preparer and is therefore enclosed as a part of this agreement. We make every reasonable effort to avoid any errors or omissions in the services or advice that we provide to clients. However, the tax law is voluminous, ambiguous and constantly changing. Our

liability for any errors or omissions will be limited to a full refund of the fees paid and will not include liability for any consequential damages. Any claim for damages will expire within two years of when the return is first completed and presented to you. Our liability is also limited to you and any recommendations provided to you may not be used or relied upon by any other parties. Disputes with the IRS regarding the interpretation of the tax law will not constitute an error or omission if you have been advised of the difference in opinion at the time your return is prepared. Although the tax returns represent our best professional opinion, we cannot guarantee the result. Tax return preparation often involves application of conflicting authorities and interpretations that present varying possibilities of Internal Revenue Service, or other federal agency or state taxing authority challenge. Opinions of various federal and state taxing authorities' personnel and of various courts are often conflicting. Judicial and legislative thought is subject to continual change. Therefore, we can only guarantee our best effort to help you arrive at the lowest legal tax liability. If there are any penalties caused by our effort which are NOT as a result of a choice by you to pursue an aggressive stance on a matter about which you were informed of a potential challenge, then we will pay such penalties. The tax liability and any interest assessed are the responsibility of you, the taxpayer. Certain types of transactions are required to be disclosed to the IRS, and you agree that it will be our decision as to whether a particular transaction is subject to such disclosure.

Please note: The payment for tax return fees is required before we release the returns, including e-mailing or transmitting them. There will be no exceptions.

If you agree to the terms and conditions for the provision of services as provided in this Engagement Letter, please indicate your acceptance by executing the enclosed copy of this letter below and by returning it with your tax information.

I agree to and accept the terms and conditions set forth in the foregoing letter.

Printed Name of Taxpayer: _____

Taxpayer Signature: _____ Date: _____

Printed Name of Joint Taxpayer: _____

Joint Taxpayer Signature: _____ Date: _____

I acknowledge that I have received a copy of Zen Tax Accounting Services, Inc. current year Service Price Schedule.

_____ (Client Initials) _____ (Client Initials)