**JRM Accounting LLC**

A Plus Accounting & Taxes

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# Engagement Letter for Income Tax Clients

Dear Client:

Thank you for choosing JRM Accounting LLC-A Plus Accounting & Taxes to assist you with your **2015** taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services that we will provide.

We will prepare both your **2015** federal and state income tax returns. We will also prepare your city and school district individual income tax returns for said year if applicable. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. An Organizer will be furnished to help collect the data required for your return.

We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, We will of course, inform you of any material errors, fraud, or other illegal acts we discover.

The law imposes penalties when taxpayers underestimate their tax liability. Please call us if you have concerns about such penalties.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

Fees for services are based on a competitive rate per attached schedule. ***All fees are due before the e-filing and/ or release of tax prepared documents.*** Acceptable payments for the 2015 tax year will be as follows:

(1) Deduct directly from bank account where refund is to be directly deposited into by the IRS or state agency, debit card, credit card, check, money order or cash.

***\* In cases where the tax preparation fees are suppose to be deducted from a clients refund and refunds are not deposited within two weeks of the scheduled IRS release date, tax prep fees will be deducted from debit or credit card information on file. Any bank fees incurred by our firm due to returned checks will be billed back to the client plus an additional 1.5% inconvenience fee of total invoiced amount. Invoices over 30 days past due will incur a .5% monthly finance charge.***

We ask the taxpayer to carefully review all tax returns. Upon your signed authorization, your federal and state, and if applicable, city and school district return will be electronically filed to the appropriate taxing authorities. Should any of your prepared returns require mailing, it is ultimately the taxpayer's responsibility. We will provide pre-addressed envelopes, but no postage is included.

Your tax returns will be prepared with extreme care. However, should you receive any correspondence from either agency in regards to these returns, contact this office immediately. We are available to assist you in settling such matters. Additional invoices will be rendered for these services at the rate of $75.00 per hour.

Should your taxes require us to perform additional accounting or bookkeeping services in order to ensure accurate filing of your taxes, additional fees will apply. We will inform you in advance of any additional services and the cost before moving forward.

We 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. We will retain copies of your records and our work papers for your engagement for seven years, after which these documents will be destroyed.

This engagement letter will serve to apply to all future years unless the agreement is terminated or amended in writing by the taxpayer or preparer. Rates are subject to change.

***Disclosure: All information obtained by client is considered confidential and will be strictly used for the purposes of executing the terms stated in the scope of the engagement and unless otherwise agreed to by client and communicated by either fax, email or in writing.***

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign and date this letter in the space indicated and return it to us via mail, fax or email.

Sincerely,

Janice R. Michel, MBA, BSc Acc

JRM Accounting LLC- A Plus Accounting & Taxes

(Both spouses must sign for preparation of joint returns.)

Accepted By:

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[Client: Taxpayer Signature]

 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[Client: Spouse Signature]

Acknowledged:

Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_

Print Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Representative for JRM Accounting LLC