



## ENGAGEMENT LETTER FOR TAX PREPARATION SERVICES

Dear Client,

Thank you for choosing **Clymer, Hall & Davis** to assist you with your taxes. This letter confirms the terms of our engagement with you and clarifies the nature and extent of the professional services that we will provide.

We will prepare your federal and requested state income tax returns. It is your responsibility to provide information we need to prepare complete and accurate returns. We may ask you for clarification of some items but will not audit or otherwise verify the data you submit. It is your responsibility to provide information required for preparation of complete and accurate returns. You should keep all documents, canceled checks and other data that support your reported income and deductions for up to three years. They may be necessary to prove accuracy and completeness of the return to a taxing authority. You are responsible for the return, so you should review them carefully before you sign them.

If there was an error on the return which results from incorrect information provided, you are responsible for any fees accrued. If it was determined that Clymer, Hall & Davis was at fault for any error on your return Clymer, Hall & Davis will be liable for any penalties and interest limited to the amount of your preparation fees. It is your obligation to bring the IRS letter to the attention of Clymer, Hall & Davis within thirty days of receipt of said letter to be compensated for any errors made.

Your return may be selected for audit by a taxing authority. Any proposed adjustments made are subject to an appeal. In the event of a tax examination, unlike other tax advisors we can be available to represent you at your initial audit appointment generally free of charge.

Our preparations fee will be based on cost per form at standard billing rates. In the off season we offer consultations generally free of charge.

We will retain copies of all records you supplied to us along with our paper work for you engagement for a period of seven years, After two years, our papers and engagement files will be destroyed. All of your original records will be returned to you at the end of this engagement. You should keep all original records in secure storage.

In regards to clients filing jointly, we are only requiring one of the taxpayer's signatures, but it shall be the responsibility of that taxpayer to inform his or her spouse of the terms of our engagement.

We appreciate your confidence in us. Please call if you have any questions regarding this engagement.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign below.

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Client Printed Name

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Client Signature

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Date