

# YOUR PRIVACY IS SECURE

## “IMPORTANT NOTICE ABOUT YOUR CONFIDENTIAL INFORMATION”



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Member

# NATP™

National Association of  
Tax Professionals



## OUR PRIVACY POLICY:

### Your Information

### Non Disclosure — Security

The nature of our work requires us to collect certain non-public information.

- ◆ We collect financial and personal information from you, worksheets, reporting statements and other forms, as well as interviews and conversations with our clients and affiliates.
- ◆ We may also review banking and other information about our clients in the performance of our work.
- ◆ Under our policy, all information we obtain about you will be provided by you or obtained with your permission.
- ◆ We have procedures and policies in place to protect your confidential information.
- ◆ We restrict access to your confidential information to those within our firm who need to know in order to provide our services.
- ◆ We will not disclose your information to a third party without your written permission, except where required by law.
- ◆ We maintain physical, electronic and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.
- ◆ Upon closing your account, your nonpublic personal information will not be disclosed to any person or party, unless required by law.

Your Privacy is important. Please trust that protecting your information is equally important to us. Please call if you have questions.

# General Engagement Letter for Individual Tax Return Preparation

This letter is to inform you, the taxpayer, of the services we will provide you, and the responsibilities you have for preparation of your tax return.

## ***Tax Return Preparation***

- We will prepare your 2022 Form 1040, U.S. Individual Income Tax Return, state tax return based on information you provide. Services for preparation of your return do not include auditing or verification of information provided by you.
- This engagement does not include any audit or examination of your books or records. In the event your return is audited, you will be responsible for verifying the items reported.
- The tax return preparation fee does not include bookkeeping. Additional fees apply for these services.
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
- Preparation fees do cover limited assistance and consultation during the year.
- The engagement to prepare your 2022 tax returns terminates upon delivery of your completed returns and original documents to you. Please store your supporting documents and copies of your tax returns in a secure place for at least seven years. You will be assessed a fee if you request a copy in the future.

## ***Taxpayer Responsibilities***

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the return carefully before signing to make sure the information is correct.
- Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required for preparation of late returns.

**Signatures.** By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities and that you understand our responsibilities in preparing your tax returns as explained above. For a joint return, both taxpayers must sign.

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Taxpayer

Date

Spouse

Date