



24 Onville Road Suite 206
Stafford, VA 22556
P (540) 720-2550 F (888) 909-8619
Email: support@tandhaccounting.com
www.tandhaccounting.com

Individual Income Tax Return Engagement Letter

Dear Client:

Thank you for selecting our firm to assist you with your tax affairs. This letter confirms the terms of our engagement with you and clarifies the nature and extent of the services we will provide.

We will prepare your 2020 federal and all state income tax returns you request, using information you provide to us. We may ask for clarification of some items, but we will not audit or otherwise verify the data you submit. Accordingly, our engagement cannot be relied upon to disclose errors, fraud, or other illegal acts that may exist. We have enclosed an “Organizer” to help you gather the information required for a complete return. If you use the Organizer, it will help you avoid overlooking important information and contribute to efficient preparation of your returns, which in turn will help keep the cost of our services as low as possible.

It is your responsibility to provide all the information required for the preparation of your tax return. By doing so, you are confirming that all the information you are supplying to us is accurate and complete to the best of your knowledge and that any expenses claimed for meals, entertainment, travel, business gifts, dues and membership, vehicle usage, and/or charitable contributions are supported by records as required by law.

You should keep all documents, canceled checks and other data that support your reported income and deductions, as this data may be necessary to prove the accuracy and completeness of the returns to a taxing authority. We are not responsible for the disallowance of doubtful deductions or inadequately supported deductions or for any resulting taxes, penalties or interest. You are responsible for the returns, so you should review them carefully before you sign them. It is not our responsibility to verify your deductions or exemptions or to audit your tax return.

The law provides various penalties and interest that may be imposed when taxpayers underestimate their tax liability. You acknowledge that any such understated tax, and any imposed interest and penalties, are your responsibility, and that we have no responsibility in that regard.

We will use our professional judgment in preparing your returns. Whenever we are aware that a possible applicable tax law is unclear or that there are conflicting interpretations of the law by authorities (e.g., tax agencies and courts), we will explain the possible positions that may be taken on your return. We will adopt whatever position you request on your return so long as it is consistent with the codes, regulations, and interpretations that have been promulgated. If the Internal Revenue Service should later contest the position taken, there may be an assessment of additional tax plus interest and penalties. We assume no liability for any such additional penalties of assessment.

The firm may from time to time, and depending on the circumstances, use third-party service providers to assist in preparing your return, but these preparers will not make substantive decisions concerning your return. We may share your tax return information with these service providers, but remain committed to maintaining the confidentiality and security of your information. Accordingly, we maintain internal policies, procedures and safeguards to protect the confidentiality of your personal information.

Unless we are required by law to disclose privileged communication, we will not provide such disclosure until you have provided written authorization for our firm to do so. If you present your tax return to a third party for any reason, you agree to inform them that we have no responsibility for the accuracy or assurance of the amounts reported. You also agree to indemnify and hold us harmless in the event that any claims are filed against us individually or as T & H Accounting, LLC.

In the interest of facilitating our services to you, we may communicate with you by facsimile (fax) or send electronic mail over the internet. Such communications may include information that is confidential to you. While we use our best efforts to keep such communications secure in accordance with our obligations under applicable law and professional standards, you recognize and accept that we have no control over unauthorized interception of these communications once they have been sent and consent to our use of these electronic devices during this engagement.

We will retain copies of records you supplied to us along with our work papers for your engagement for a period of seven years. After seven years, our work papers and engagement files will be destroyed. All of your original records will be returned to you when you receive your copy of the return. You should keep the original records in secure storage. A fee will be charged for any additional copies of any records you request from our office.

We have the right to withdraw from this engagement if you do not provide us with any information we request in a timely manner, refuse to cooperate with our reasonable requests, or misrepresent any facts. Our withdrawal will release us from any obligation to complete your return and will constitute completion of our engagement. You agree to compensate us for our time and out-of-pocket expenses through the date of our withdrawal.

Full payment of your tax preparation fee is required before we will electronically file your return or release the paper return to you. Insufficient funds checks returned to us by the bank will incur an additional \$50 fee, and if we have to take collection action to collect our fees, any and all costs of collection, including attorney fees that we incur, will be added to the final amount to be collected.

We appreciate the opportunity to serve you. Please date and sign this letter to acknowledge your agreement with, and acceptance of your responsibilities, and the terms of this engagement.

Very truly yours,

T & H ACCOUNTING, LLC

ACCEPTED AND AGREED:

_____	_____	_____
Taxpayer Signature	Print Name	Date

_____	_____	_____
Spouse Signature	Print Name	Date

(Both taxpayer and spouse must sign for preparation of joint returns)