

Contract: Preparation of your 2024 Tax Returns

Thank you for choosing Tax Partners Northwest to assist you with your 2024 personal income tax return. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your 2024 federal and state income tax returns. 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. You are responsible for maintaining appropriate records, such as official tax documents you receive, receipts and substantiation for your deductions, and purchase and sales information for assets.

We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find misappropriations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will, of course, inform you of any material errors, fraud, or other illegal acts we discover.

It is your responsibility to review your returns before they are filed to determine that all income has been correctly reported and that you have substantiation for your deductions. You agree to contact us immediately if you discover additional information that will lead to a change in your returns, or if you receive any letters from the IRS or state taxing authorities.

If your returns are later selected for review or audit by taxing authorities, we will be glad to assist you or represent you if you desire. Our fees for preparing your returns do not include time that might be necessary to assist you during a taxing authority review.

Our fees for preparation of your return are based on a schedule of tax forms prepared and may include charges for extra time spent preparing more complicated worksheets and schedules. **Payment is expected upon completion of the returns but before the returns are filed.** Additional services for audit assistance or representation are based on an hourly rate of \$250 an hour plus out of pocket expenses, a portion of which may be required to be paid in advance in the form of a retainer.

Our deadline for receiving information for personal tax returns is March 15. Clients who provide information later than this and do not want to go on extension **may** be charged an expediting fee. Clients who provide information for their extended return after September 25 **will** be charged an expediting fee.

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, cancelled 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 three years, after which these documents will be destroyed.

Our engagement to prepare your 2024 tax returns will conclude with the delivery of the completed filings to you (if paper-filing), or your signature and our subsequent transmittal of your tax return (if e-filing). If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them.

Our firm does not file extensions without written permission from our clients.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign the enclosed copy of this letter in the space indicated and return it to us.

We appreciate your confidence in us. Please call if you have questions.

Sincerely,

Tax Partners Northwest

Accepted by:

Print name: