

MSH Tax & Accounting, LLC

Engagement Letter for Individual Tax Return Preparation

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

Tax Return Preparation

- We will prepare your 2023 federal and state tax returns based on information provided by you. We will not audit or otherwise verify the information provided, although we may ask for clarification if the information appears incorrect, inconsistent, or incomplete.
- Your tax returns will be electronically filed as applicable. We will provide a copy of your final returns for your review prior to filing. You have final responsibility for the income tax returns and, therefore, you should review them carefully prior to filing to ensure the tax returns are complete and accurate.
- All invoices are due and payable at the time of presentation. Should you choose to terminate this engagement prior to completion of the tax returns, you agree to pay our fee based on time expended at our standard hourly rates.
- We reserve the right to withdraw from the engagement at any time due to unpaid fees, guidance of our professional standards, or for any other reason.
- The tax return preparation fees do not include audit representation or preparing materials to respond to correspondence from taxing authorities. We would be pleased, however, to represent you under the terms of a separate engagement.
- This engagement will be considered complete upon acceptance of your e-filed returns by the tax authorities. Please store your supporting documents and copies of your tax returns in a secure place for at least seven years.

Taxpayer Responsibilities

- You represent that the information provided will be accurate and complete to the best of your knowledge and that you possess all required supporting documentation for the items reported. Please feel free to contact us for guidance regarding appropriate documentation for substantiation of income and expenses. Your signature confirms that we have advised you of the record keeping requirements.
- 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.

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.

Taxpayer _____ *Spouse* _____ *Date* _____

Print Name _____

Privacy Policy. Our firm has 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 you with services. We will not disclose your personal information to any third party without your express 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. Please contact us with any questions regarding our privacy policy.

**MSH Tax &
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