

# Account on Me - Income Tax Preparation Service Agreement

*We appreciate the opportunity to work with and advise you regarding your federal and state individual income taxes. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements:*

1. We will prepare your federal and state individual income tax returns. These returns will be prepared from information which you will furnish to us. We will not audit or make any other verification on the data you submit, although it may be necessary to ask you for clarification of some of the information. We will furnish you with an online checklist to help you in gathering the necessary information (please note this list is not comprehensive, and any forms you are unsure about should be submitted to me prior to me preparing your tax forms). In the event of an audit by a taxing authority, you will be required to provide the documentation for all items in question to the taxing authority. It is the taxpayer's (you) responsibility to obtain or retain all documentation that supports your tax liability.
2. It is your responsibility to provide **all** the information required for the preparation of a complete and accurate tax return. You should retain all documents, cancelled checks and other data that form the basis of income and deductions for at least the period of the statute of limitations (typically 3 years, but can be unlimited in certain situations). You should also retain documents that support items carried over into open years, such as cost basis information, nondeductible IRA's, net operating losses, etc. This information may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns; therefore, you should review them carefully before you sign or give consent to have them transmitted. If for some reason you believe your returns have not been received by the taxing authorities, (i.e., didn't get your refund or they haven't cashed your check) then please contact us.
3. Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover errors or omissions by you, fraud, misrepresentations, defalcations and/or other irregularities, should any exist. We will render such accounting and bookkeeping assistance as determined to be necessary *only* for the preparation of your income tax returns. It is your responsibility to provide us with accurate, truthful information for use in preparing your tax forms.
4. We will use professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authority & your interpretation of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.
5. Your returns may be selected for review for any reason by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination, we will be available upon request to help you resolve these issues. However, such assistance is not included in your tax preparation fee and we will render additional fees for the time and expense incurred on a case by case basis. Moreover, the taxing authorities may correspond with you regarding your tax return. You agree to timely forward this correspondence to us for review and analysis. Additional fees may be charged depending upon the response required.
6. Your quoted preparation fee is required to begin work, and payment in full for services is due prior to us filing and transmitting your taxes. Thank you for your trust in our professional tax preparation services.

Please sign and return to confirm you agree with the terms as stated above.

\* \_\_\_\_\_ Date \_\_\_/\_\_\_/\_\_\_\_\_