ENGAGEMENT AGREEMENT

Taxpayer's Name:_____ **Last 4 of SSN / ITIN:**_____.

You have chosen the professionals at **J. Squared Services** to prepare and file your tax return on _____/_____/_____. In doing so, you are telling us that you have received all your tax information (W-2s, 1099s, etc.) and that your tax return (s) is ready to be filed. We will prepare your federal and state income tax returns based on the provided information needed to complete and accurately prepare your return (s). We may ask you to clarify some of the information provided but will not audit or otherwise verify the data you submit.

IF you receive additional information after we file your return, this document is your official notification that should you request our services in filing the required amended return; we will be charging you an additional **FEE** for services rendered. **INITIAL HERE** _____.

ALL clients will be given one copy of their tax return. Should you need additional copies now or on a later date, we will provide them to you; however, there will be a **fifty ($50.00)** dollar charge per extra printed copy. **INITIAL HERE** _____.

We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations 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 inform you of any material errors, fraud, or other illegal acts we discover.

Our fee is based on the time required at standard billing rates plus out-of-pocket expenses. Invoices are due and payable upon presentation. All accounts not paid within thirty (30) days are subject to interest charges to the extent permitted by state law.

Your preparation fee only includes the cost of preparing and filing your tax return. If you are **AUDITED**, additional services may be rendered to you for a fee. Audits are conducted by the IRS and the State Taxation departments at random to prevent fraud. If you are selected for Audit and wish to be represented by our firm, we will requireyou to sign a Power of Attorney form and a Tax Resolution Hiring Agreement. Additional fees will be explained to you. **INITIAL HERE** _____.

This firm does not offer free quotes or free estimates. If you decide to not move forward with the preparation of the tax return a consultation fee of **Ninety-five ($95.00)** dollars will be charged. **INITIAL HERE** _____.

STATEMENT OF UNDERSTANDING

I am paying for the time and expertise of a tax professional. I understand that I will be charged for the preparation of this tax return. I understand that my return will be prepared based on the information I provide. I am solely responsible for the accuracy of that information and for maintaining the records to support it.

Taxpayer's Signature:_____ **Date:**_____/_____/_____.

Spouse's Signature:_____ **Date:**_____/_____/_____.

For Office Use Only:

Triage:_____ **QC:**_____ **QC Date:**_____/_____/_____.

Expires: 12/31/2023