

**Joan W Halter, CPA  
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Mullica Hill, NJ 08062  
856-478-0770**

## **ENGAGEMENT LETTER**

Dear :

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements.

We will prepare your 2020 federal and state income tax returns from information which you will furnish to us. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. We will furnish you with questionnaires and worksheets to guide you in gathering the necessary information. Your use of such forms will assist in keeping the fee to a minimum.

Due to the high volume of tax returns prepared by our firm, we prepare returns in the order in which complete information is received. Complete information means we have ALL information necessary to prepare a complete and accurate income tax return. It may become necessary to apply for an extension of the filing deadline if there are unresolved issues or delays in processing, or if we do not receive all of the necessary information from you on a timely basis. Our firm will not file applications for extension unless we receive an executed copy of this Engagement Agreement and your express written authorization to do so. The extension is for additional time only. Any anticipated tax due MUST be paid on or before April 15, 2021.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, cancelled checks and other data that form the basis of income and deductions. These 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 and, therefore, you should review them carefully before you sign them.

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations and/or irregularities, should any exist. We will render such accounting and bookkeeping assistance as determined to be necessary for preparation of the income tax returns.

The law provides various penalties that may be imposed when taxpayers understate their tax liability. If you would like information on the amount or the circumstances of these penalties, please contact us.

Your returns may be selected for review 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 represent you and will render additional invoices for the time and expenses incurred.

Our fees for these services are based on the amount of time required, which is based on the complexity of the returns and whether or not you request an appointment. Full payment is due

upon services rendered and prior to e-filing. Client shall be responsible to reimburse for all out of pocket expenses incurred in exercising any rights or remedies with this Agreement, including, without limitation, reasonable attorney's fees and costs, whether or not suit is brought. If court action is necessary, Client agrees that this document is deemed a contract under the laws of the State of New Jersey and consents to the State and Federal courts governing Gloucester County, NJ. Amounts not paid within 30 days will be charged interest at a rate of 1.5% per month. Checks should be made payable to Joan W. Halter, CPA. For other payment methods a convenience fee may apply.

You agree to indemnify and hold us harmless with respect to any and all claims arising from the use of the tax returns for any purpose other than filing with the IRS and state and local tax authorities regardless of the nature of the claim, including the negligence of any party. We will not respond to any request from banks, mortgage brokers or others for verification of any information reported on these tax returns. We do not communicate with third parties or provide them with copies of tax returns.

If the foregoing fairly sets forth your understanding, please sign the enclosed copy of this letter in the space indicated and return it to our office. However, if there are other tax returns you expect us to prepare, please inform us by noting so at the end of the return copy of this letter.

We want to express our appreciation for this opportunity to work with you.

Very truly yours,

Joan W Halter, CPA

Accepted By: \_\_\_\_\_

Date: \_\_\_\_\_