



Engagement Letter for Individual 2023 Tax Return Preparation

This letter is to inform you, the taxpayer, of the services S.J. & J. Inc. will provide you 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 you provide. Services for preparation of your return do not include auditing or verification of information provided by you.
- This engagement does not include any audit or examination of your books or records. In the event your return is audited; you will be responsible for verifying the items reported.
- You must review the return carefully before signing to make sure the information is correct.
- Our fee includes general tax questions and simple tax planning throughout the year. Any issues that require more detailed planning will be subject to an additional fee.
- The tax return preparation fee does not include bookkeeping.
- Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required for the preparation of late returns.
- The engagement to prepare your **2023** tax returns terminates upon delivery of your completed returns and original documents to you. Please store your supporting documents and copies of your tax returns in a secure place for at least five years.
- We are not responsible for disallowance of doubtful deductions or inadequately supported documentation, nor for resulting taxes, penalties, and interest. We will prepare the return based on the information provided by you. We will rely without further verification upon information you provide from third parties including but not limited to K-1's, 1099's, 1098's, receipts, and other similar items.

Taxpayer Responsibility

- You agree to provide S. J. & J. Inc. all income and deductible expense information. 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.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either The IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You are required to pay (in full) S. J. & J. Inc. for services rendered at the time of the appointment.

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. By signing, you also acknowledge receipt of our Privacy Policy.

Signature

Signature

Date



S. J. & J. Inc.

Tax Preparation & Bookkeeping Services

Privacy Policy: The nature of our work requires us to collect certain nonpublic personal information about you from various sources. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. Under our policy, all information we obtain about you will be provided by you or obtained with your permission. 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 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.