

January 29, 2022

Linda Dodson
335 Beechwood Dr
Athens, GA 30606-4009
Linda.dodson0626@gmail.com
706.540.5947

Re: Tax Preparation Engagement

Dear Client,

Thank you for having me prepare your 2021 federal and state income tax returns. This letter confirms the terms of my engagement with you and outlines the nature and extent of services I will provide.

I will prepare your 2021 federal and state income personal tax returns using information you provide. I will depend on you to provide the information I need to prepare complete and accurate returns. I may ask you to clarify some items, but will not audit or otherwise verify the data you submit.

My fee for preparing your tax returns is based on a fee per schedule/form needed to complete your returns, plus any out-of-pocket expenses. All tax preparation fees are due and payable when you receive your completed returns. *I will not e-file your returns without full payment.* If I have to perform significant bookkeeping work in order to get your financial records ready for tax preparation, I will bill at an hourly rate of \$50.

All of the information you give me is confidential. I restrict access to your information and maintain physical, electronic and procedural safeguards to protect your information. No one can get your information from me without your expressed permission, except for a government agency following due process of law. During tax season, the most efficient way to communicate with clients is via email. However, as emails can be intercepted and read, disclosed, or otherwise used or communicated by an unintended third party, I cannot guarantee that my emails will be properly delivered and read only by the addressee. Therefore, I specifically disclaim and waive any liability or responsibility whatsoever for interception or unintentional disclosure of my emails in connection with the performance of this engagement. In that regard, you agree that I shall have no liability for any loss or damage to any person or entity resulting from the use of email transmissions, including any consequential, incidental, direct, indirect, or special damages, such as loss of revenues or anticipated profits, or disclosure or communication of confidential or proprietary information. I will not send your confidential documents via email, and I encourage you not to either. Instead I have provided a secure portal for data transfer.

You should securely store your original records, along with all documents, canceled checks, and other data that support your reported income and deductions. These items may later be needed to prove accuracy and completeness of a return. I will electronically retain copies of your records and our work papers for your engagement for seven years, after which these documents will be destroyed.

You are responsible for promptly letting me know if you receive any letters from any taxing authority. I correct for free any errors found in returns I prepare and pay any penalties if I am at fault. However, I am not responsible for paying any taxes owed.

Your returns may be selected for audit by a taxing authority. Any proposed adjustments are subject to appeal. In the event of a tax audit, I can arrange to be available to represent you, or to prepare materials in response to correspondence. Such representation is a separate engagement for which an engagement letter will be provided to you.

My engagement to prepare your tax returns will conclude with the delivery of the completed returns to you (if paper-filing), or your signature and our subsequent submittal of your tax return (if e-filing). If I am not able to e-file your returns, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax return documents carefully before signing them.

To indicate that this letter correctly summarizes your understanding of the arrangements for this work, please sign this letter in the space indicated and return it to me. I appreciate your confidence in me. Please let me know if you have any questions.

Sincerely,

Linda L. Dodson

I agree to the aforementioned terms and conditions with my hand and signature below:

Your signature: _____ Spouse's signature: _____

Print name: _____ Print spouse's name: _____

Date: _____