



Engagement Letter Income Tax Returns (Individuals and Business)

Dear Valued Client:

Thank you for the privilege of allowing **CR Taxes & Accounting, LLC**, to provide you with year-round taxation services. We are committed to providing you with the highest quality of tax preparation and excellent service. This engagement letter expresses the terms and conditions under which we will provide you with taxation services and outlines the responsibilities for us.

We will prepare your federal income tax return (and any state returns you may require) from the information you provide. In preparing your return(s), **we will not audit or verify the data you submit (although we may ask questions for clarification). Our work will not include any procedures to discover defalcations or other irregularities. The only accounting or analysis work we will perform is the due diligence necessary and required by the Internal Revenue Service and State Taxing Authorities for the preparation of your income tax return(s).** We will use our professional judgment in resolving questions where tax law is unclear or where there may be different interpretations of the law. We will resolve such questions in your favor whenever possible.

We will furnish a checklist /organizer to help you gather the necessary information. Please provide the completed checklist with all the information required to expeditiously prepare your return(s). The information presented is accurate and complete to the best of your knowledge. You will also verify that the income and expense items you claim on your return(s) are substantiated by proper records and receipts. You should keep all documents, canceled checks and other data that support your reported income and deductions. _____ **(Initial)**

Client Portal: You acknowledge that you will upload/download and communicate if needed within the portal. The client portal is encrypted for your safety to reduce the risk related to internet email accounts such as identity theft. Please **DO NOT UNSUBSCRIBE** from the Client Portal. The Portal is used to communicate with you regarding tax law changes and office closings. _____ **(Initial)**

Tax Portal – The purpose of the encrypted tax portal is to safely send your tax papers for signatures and provide you with a copy of your signed and completed tax return (required by law). You acknowledge that you will download your copy to your computer once your papers are completed with signatures. _____ **(Initial)**

You are responsible for the accuracy of your return(s) and should review all returns carefully. If applicable, mailing your tax return is your responsibility; however, for your convenience we will perform this service for an additional cost. We may provide pre-addressed envelopes, but no postage is included. Your returns, of course, are subject to review by the taxing authorities. However, if you receive a letter (notice) from the IRS or your return is selected for audit, it does not mean there is a problem. **In your best interest, it is advisable for you to contact this office immediately and upload it into your portal upon receiving correspondence from the Internal Revenue Service. TIME IS OF ESSENCE** and any delay can incur increased penalties and or interest or the delay in processing your return. We will be available to assist you and/or represent you at our current rate of \$175 an hour. _____ **(Initial)**

If there is an error on the return which results from incorrect information supplied by you, you are responsible for the payment of any additional taxes which would have been properly due on the original return(s), and any interest and penalties charged by the IRS. If we have made an error, other than an error caused by incorrect information you supplied, **we will be responsible for payment of penalties only**. We will not pay interest or any additional tax due since the tax would have been payable had the return been correctly prepared. _____ **(Initial)**

Representation Fees: The hourly rate for representation is \$175. This is document retrieval from any taxing authority, responding to notices of any taxing authority, tax assessment abatements and paper processing of any kind. _____ **(Initial)**

Preparation Fees will be computed according to our current fee schedule, plus any out-of-pocket expenses. Organizing records and compiling figures for entry on the tax return will be billed at our consulting rate of **\$175** an hour. Such charges are billed in addition to the fee schedule. If fees cannot be deducted from your refund due to IRS debt, **FULL PAYMENT OF YOUR PREPARATION FEE IS REQUIRED BEFORE WE ELECTRONICALLY FILE AND OR RELEASE THE RETURN TO YOU. IF YOUR REFUND IS OFFSET AND YOU ARE UNABLE TO PAY, YOUR RETURN WILL NOT BE RELEASED UNTIL THE BALANCE IS PAID IN FULL.** We reserve the right to ask for a retainer fee (\$100/min) to be paid in advance by new clients and any client with whom we have experienced payment problems. To the extent permitted by state law, late fees and interest charges may be added to all accounts not paid within thirty (30) days of completion of service.

If further collection efforts are required, you will be billed for any court fees **CR Taxes & Accounting, LLC**, incurs during the collection efforts. Rates are subject to change and are usually updated each year. _____ **(Initial)**

Payment for Services Provided: There are several payment options: PayPal, CashApp, Venmo, Credit Card, Check, Cash, **Zelle (preferred method)** and deducted from your refund with Refund Advantage Bank (bank fees apply). If paying with PayPal, CashApp, Venmo, Credit Card, you will be charged a processing fee of 3.7% _____ **(Initial)**

Tax Return File Copy: A soft copy of your tax return will be provided to you via the portal or the tax app for your files. Please download to your files. Additional copies no matter which form (paper or PDF) is \$25.00. _____ **(Initial)**

Extension Requests: Please contact us if you would like to request an extension to file your taxes. An extension will be filed automatically if we receive your tax information after April 1st. **Please note that an extension to file is not an extension to pay.** You will be assessed penalties and interest if you have unpaid taxes due April 15th. **WE DO NOT AUTOMATICALLY FILE EXTENSIONS.** _____ **(Initial)**

Refunds: Please contact the IRS for any delays with your refund @ 1.800.866.1040. You can locate refund information at www.IRS.Gov or the IRS2Go app, **“Where is my Refund.** You can also track your refund from my website www.crtaxlady.com located at the bottom of the page for both your federal and state refund. You will be billed at our hourly rate if we inquire on your behalf if the delay is not a processing error of CR Taxes & Accounting, LLC. _____ **(Initial)**

Office Closed Dates: Please note that the office is closed on all Holidays, Sundays, and when IRS systems shut down (Nov 15 thru Jan 15). Please refer to www.crtaxlady.com for office hours. Any emergency or needed office closings will be communicated via the Newsletters /Client Portal _____ **(Initial)**

Revised 2024

Privacy Statement: We maintain a file of tax returns as required by law which we have prepared and/or electronically filed. We do not share your information with anyone else, except as required by law, without your written consent. _____(Initial)

This engagement letter will apply for all future years unless the agreement as a courtesy is terminated or amended in writing by you or the preparer. To affirm that this letter correctly summarizes your understanding of the arrangements for taxation services provided, please sign, and return this letter and or bring it with you to your tax appointment. A completed copy will be returned electronically to your email for your records. _____(Initial)

We appreciate your confidence in us; please contact us with any questions and or concerns that you may have.

Sincerely,

CR Taxes & Accounting, LLC
www.crtaxlady.com (Website)
info@crtaxlady.com (Email)
1.833.373.3009 (Office)
1.866.768.2333 (Fax)

(Spouses must sign for joint filing)

Taxpayer Name	Spouse Name
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Taxpayer Signature	Spouse Signature	Date
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