

COMPLETE TAX ADVANTAGE
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4611 FREEPORT BLVD., #7, SACRAMENTO, CA 95822
Engagement of Services for 2017 Taxes (Page 1 of 2)

Thank you for selecting Complete Tax Advantage to prepare your 2017 tax returns. This letter confirms the terms of our engagement with you and the nature, timing, and limitations of the services we will provide.

We will prepare your Federal and State Individual Income Tax Returns from the information you provide. Services for tax preparation do **not** include auditing or verification of information provided by you. You acknowledge that all information you provide will be complete and accurate and that all your income has been included, including any foreign earned income. 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. **Note that penalties for failure to report foreign account activities and substantial underreporting income are severe. You have the final responsibility for the income tax returns and, therefore, you should carefully review them before you sign and file them. A signed engagement letter and a retainer of 50% of your projected fee are requested when the return processing is started.**

Tax Organizer We have provided an organizer for your use. While we don't require its use, it may serve as a useful "tickler" to remind you of items to provide to us. Nonetheless, please provide us with originals or copies of originals of all government tax documents including W-2s, 1099s, 1098s, and property tax statements.

We will use professional judgment in resolving issues when the tax law is unclear or when there is conflict among the authorities. If you receive additional information after we begin working on your returns, we ask that you contact us immediately to ensure your completed tax returns contain all relevant information.

Tax Preparation fees are based upon the forms necessary to file your returns and limited assistance and consultation during the year. Tax preparation fees do **not** include Audit correspondence response or representation, accounting or bookkeeping services. Should you need additional services such as data organization, accounting or bookkeeping to complete your return, we can provide these ancillary services at an hourly rate and estimate hours needed. Our professional fees for these services are \$35-\$65/hr for accounting and bookkeeping services; and \$120/hr for Audit Representation. Full payment for tax return preparation is required when the returns are completed.

Document Due Date We must receive **all information substantially** necessary to prepare your return by **Friday, March 30th**, to ensure that your completed tax returns or extensions with appropriate tax estimates are completed by **Tuesday, April 17, 2018**. (April 16th is a holiday in Washington, D.C.)

Extensions We will prepare IRS Form 4868 (and FTB form 3519, if applicable) if we have not received all your information by Friday, March 30th provided we have **received your signed engagement letter and 50% retainer for our fees**. Please remember that the extension does **not** extend your time to pay any taxes due but can prevent substantial additional penalties.

If we estimate you will owe taxes, we will provide a payment voucher(s) with the extension based upon the information we have been given. Rather than U.S. mail, we encourage taxpayers to utilize the online payment options provided by the taxing agencies on their respective websites: **www.IRS.gov** or **www.FTB.CA.gov**.

Form 1095 All taxpayers are required to provide Form 1095-A, -B or -C as proof of health insurance coverage. Please request this early from your insurance provider if you have not received it.

Earned Income Credit and Child Tax Credit Taxpayers are required to provide proof of dependent child's residency such as school or health insurance record.

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(Please print and sign below)

We appreciate your confidence in us and are pleased to have you as a client. If the foregoing sets forth your understanding, please sign the enclosed copy of this letter and return to our office. Work cannot commence until a signed copy of this document is returned. If this is a joint return, both spouses must sign.

Accepted By:

Taxpayer Signature/Print Name

Spouse Signature/Print Name

Date

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Received By: _____ Date: _____

Our Guarantees to You

- We will provide a ½ **hour complementary** email/phone queries or office appointment for tax planning purposes all year. However, if the question or issue requires additional research or analysis beyond the consultation, that work will be subject to our hourly rates
- We will return your phone calls and emails within 2-4 business days during tax season
- We will prepare required returns for your **dependent** child at a 50% discount
- We will start your appointment within 15 minutes of the scheduled time
- We are responsible for penalties related to any preparation errors
- We provide convenient extended hours during the tax season including some Saturdays and evenings

Your Guarantees to Us

- You will do your best to accumulate your tax information in an orderly manner and try to submit the information a week prior to your appointment
- You will attend your appointment or call us to reschedule at least 24 hours in advance
- You will review your tax returns carefully before signing the E-File Authorization forms

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. We may also review banking and credit card information about our clients in the performance of receipt of payment. 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 in order 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.