

Tax Engagement and Preparation Terms

Please complete this form and return with your tax documents to your tax preparer.

Thank you for choosing Mira Mesa Tax Services Inc to assist you with your taxes. This letter confirms the terms of our engagement with you and your business and outlines the nature and extent of the services we will provide.

We will prepare the Federal and State income tax returns for your business. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit.

We collect nonpublic information about you and your business from the interviews and tax-related documents you provide that are required to prepare and process the tax returns. We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will, of course, inform you of any material errors, fraud, or other illegal acts we discover. We will act in compliance of IRS Circular 230 tax professional's duties and obligations.

The law imposes penalties when taxpayers underestimate their tax liability. Please contact us if you have concerns about such penalties. Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

Our fee will be based on the time required, forms to be filed, and complexity of your tax situation at standard billing rates plus out-of-pocket expenses. Invoices are due and payable upon presentation. For payments by a credit or debit card, an additional convenience fee of up to 3.5% will be added. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (30) days.

We will return your original records to you at the end of this engagement. You should securely store these records, along with all supporting documents, canceled checks, etc., as these items may later be needed to prove accuracy and completeness of a return.

We will retain electronic copies of your records and our work papers for your engagement for seven years, after which these documents will be destroyed.

Our engagement to prepare your tax returns will conclude with the subsequent submittal, of your tax return (when e-filing) and a hardcopy or electronic copy of the completed returns to you for your signing. If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them.

We do **NOT** disclose any nonpublic personal information about our clients or former clients to anyone, except as requested by our clients or required by law. We restrict access to nonpublic personal information concerning you and your business. We maintain physical, electronic and procedural safeguards that comply with federal regulations to guard your nonpublic personal and business information.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign this letter in the space indicated below and return it to us.

We appreciate your confidence in us. Please call if you have questions.

Sincerely,

Mathieu Jonkers
Mira Mesa Tax Services Inc

Accepted By:

Business name: _____

Your name and title: _____

Signature

Date
