

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 outlines the nature and extent of the services we will provide.

We will prepare your individual federal and state income tax returns. 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.

Our **Tax Forms Organizer** will help you to collect the data required for your return, and avoid overlooking important information. By using it, you will contribute to efficient preparation of your returns and help minimize the cost of our services.

We collect nonpublic information about you from the interviews and tax-related documents you provide that are required to prepare and process your 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.

Tax Preparation Terms Individual

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. We maintain physical, electronic and procedural safeguards that comply with federal regulations to guard your nonpublic personal information.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign the enclosed copy of this letter in the space indicated 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:

Your name / signature

Date

Spouse name / signature

Date

(Both spouses must sign for preparation of joint returns.)