



1533 Cahah Mountain Rd, Hudson, NC 28638  
828-396-7165

CLIENT NAME: \_\_\_\_\_

***Engagement Letter for Preparation of Your Individual Tax Returns***

Dear Client:

Thank you for selecting J&D Tax Service Inc. to assist you with your tax affairs. This letter confirms the terms of our engagement with you and the nature and extent of services we will provide.

***Tax Return Preparation***

- We will prepare your 2023 federal and all state income tax returns you request using information you provide to us.
- We may ask for clarification of some items, but we will not audit or otherwise verify the data you submit. We've prepared a simple questionnaire to help gather required information that may have changed from previous years.
- We must use our judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. In order to avoid penalties, we will apply the "more likely than not" reliance standard to resolve such issues.
- Preparation fees do not include bookkeeping
- We retain copies of records you supplied to us along with work papers that include tax withholdings for up to 5 years.

***Taxpayer Responsibilities***

- Upon signing Form 8879, you agree to honor our decisions regarding the need to make protective disclosures in your returns.
- It is your responsibility to provide information required for preparation of complete and accurate returns. You should keep all documents that support your reported income and deductions.
- 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.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- If your returns include any of the following, you must be able to provide required documentation to verify that you meet the qualifications:
  - Earned Income Credit, Head of Household Status, Child Tax Credit, American Opportunity Credit, Education Credit
- Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed.

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

Sincerely,

J&D Tax Service Inc.

Bethany Scott EA, Janie Miller, Diane Johnson, Akeshia Crump and Amanda Curtis



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By Signing this document, you acknowledge that you have read, understand, and accept your obligations and responsibilities and that you understand our responsibilities in preparing your tax returns as explained above.

*(For joint return, both taxpayers must sign)*

Accepted By: (T) \_\_\_\_\_

(S) \_\_\_\_\_

Date: \_\_\_\_\_

**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. Please contact us with any questions regarding our privacy policy.*

In the event that I am unable, I, \_\_\_\_\_ give the following individuals permission to gain access to my tax documentation.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_