



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 choosing J&D Tax Service Inc. This letter outlines our engagement terms and the services we will provide.

#### Tax Return Preparation

We will prepare your 2024 federal and requested state income tax returns based on the information you provide. While we may seek clarification on some items, we will not audit or verify your data. We will apply the “more likely than not” standard when resolving unclear tax issues. 2024 tax prep fees cover current year prep as well as one hour of “outside” tax season support. If any additional services or amended returns are needed, due to taxpayer error, additional fees may apply. Please note that preparation fees do not cover bookkeeping; additional fees will apply if bookkeeping is needed. We will retain copies of your records and related work papers for five years.

#### Taxpayer Responsibilities

By signing Form 8879, you agree to our decisions regarding protective disclosures. You are responsible for providing complete and accurate information and must keep documentation to support your income and deductions. If audited, you must provide written records for all reported items. This includes documentation for specific credits like the Earned Income Credit, Head of Household Status, and others.

Fees must be paid before we deliver or file your tax return. If you terminate our engagement before completion, you agree to pay for work completed.

Thank you, and we look forward to assisting you!

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

Sincerely,  
J&D Tax Service Inc.

***Bethany Scott***

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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 2020 tax returns as explained above.

(For joint return, both taxpayers must sign)

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

*Our firm collects nonpublic personal information from various sources, including applications, worksheets, and client interviews. We may also review banking and credit card information for payment processing. All information is provided by you or obtained with your consent.*

*We have strict procedures in place to protect your confidential information, limiting access to those who need it for service delivery. We will not disclose your personal information to third parties without your explicit permission, unless required by law. We maintain safeguards—physical, electronic, and procedural—in accordance with federal regulations to prevent unauthorized access.*

*For any questions regarding our privacy policy, please feel free to contact us.*