



MWM Tax Services
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Valparaiso, IN 46385
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(844) 410-9363 Fax



2020 Tax Year Engagement Letter for Individual Tax Return Preparation

Client(s): _____ / _____
Taxpayer Last Name, First Name / Spouse Last name, First Name

We truly appreciate the opportunity to work with you this tax season! Please note that signed Engagement Letters are now required for tax return preparation. This engagement letter is designed to confirm the terms and conditions under which we will provide you with tax services. It also outlines the responsibilities for each of us in this process. It is important that you read, sign, and return this engagement letter with your tax documents. **Without a signed engagement letter, we will be unable to begin your tax filing.**

Tax Preparation:

- n I/We will prepare your federal and state tax return(s) with supporting schedules for the applicable tax year (2020) based upon information you provide.
- You agree to provide any requested records needed in order to complete the tax return(s) preparation. Original records will be returned upon completion of the tax return(s). Photocopies or scanned copies will be accepted as long as all pages and both sides of documents are included. We are not responsible for lost, damaged, or stolen records.
- n My/Our policy is to process all tax returns in the order that they are received per season. It is important that we receive your documents as soon as possible for timely filing. However, I/we also understand that life happens. Please note, if we receive documents within 2 weeks of the filing date (Regular or Extension), we ask you to be patient as we may need to re-prioritize your return completion to allow for the best possible timing for all clients.
- n If we are unable to complete your tax return by the due date, or if we receive your documents too late in the season, you give us permission to file a tax extension (Form 4868) on your behalf. If one is filed, you will be notified prior to filing and provided proof of extension after filing has been accepted.
- n We will not be responsible for penalties and/or interest charges that you might incur if you have not met your tax liability by the due date of the return. Whenever possible, we will attempt to advise you if we project that you may have an unmet tax liability.
- n We will not audit or otherwise verify your records to discover errors or omissions, should any exist. However, if we find irregularities or unusual items, we will bring them to your attention and/or ask for clarification. Further advisement regarding the best tax position may be needed.
- n We will provide bookkeeping assistance necessary to complete the tax preparation at an additional charge.
- n You agree and confirm that income and expense items you claim are substantiated by proper records and receipts, and can furnish such documentation in the event of an audit.
- n You agree and confirm that the information you provide is accurate and complete to the best of your knowledge.

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- n You are ultimately responsible for the accuracy of the tax return(s) and should review all documents carefully before signing the final documentation.

Fees & Payment:

- n Tax preparation fees are due at the time the return is complete unless a payment arrangement has been signed and approved prior to tax preparation.
- n We reserve the right to ask for a retainer to be paid in advance.
- n We accept cash, check, Credit Card and Bank Drafts as forms of payment as a courtesy to our clients. If a payment plan is needed, it must be signed and approved prior to tax preparation.
- n All preparation fees are invoiced per tax return per tax year.
- n Our fees are based on a pre-determined discounted rate for basic filing per return or for more complicated returns, can include the base rate with additional fees added based upon the complexity of your tax return(s) and any additional out-of pocket expenses we may incur.
 - n An updated Fee list for Tax Preparation services will be posted on our website by February 12, 2021 and will be available upon request anytime after that date.
- n If you terminate this engagement before completion, you agree to pay the higher of a \$50.00 terminating fee or for actual time and expenses incurred prior to the date of termination, even if the tax return(s) are not completed.
- n In the event the client has any past due balances, we reserve the right to cease working on your tax return(s) or providing any other services until the balance has been paid in full or other acceptable payment arrangements have been made.
 - n Past due balances of more than 30 days are subject to 18% annual interest.
 - n At any time after 90 days past due, your account may be sent to collections. You are responsible for any court costs, attorneys' fees, and any costs resulting from collection attempts.

Important Notices:

- n Where tax law is ambiguous or unclear; we will use our best judgment.
 - n *Unless otherwise instructed by you, we will resolve questions that arise, when possible, in your favor.*
- n Penalties can be imposed when taxpayers understate their tax liability.
 - n If an extension to file taxes is required, any estimated taxes owed must be paid when the extension is filed. And while we may assist you in determining the amount of estimated tax payment you should make, we are not responsible if the estimate we recommend does not cover your tax liability. Any amounts not paid by the original filing deadline are subject to interest and late payment penalties. We are not responsible for any penalties and interest charges you may incur if estimated tax payments are not timely made.
- n The IRS does not permit us to discuss your tax return except if authorized by the client by

checking a specific box on your tax return. Unless otherwise instructed by you, we will check the box which authorizes the IRS to discuss your tax return with us. Additionally, we may ask you to sign a Form 8821-Tax Information Authorization or Form 2848-Power of Attorney and Declaration of Representative. Signing these forms will insure that we receive any notices you might receive thus insuring timely responses as needed.

- n Your tax return(s) may be selected for audit by tax authorities. We are available to assist you in response to correspondence. However, we reserve the right to invoice for additional time and expenses incurred.
- n One printed and one electronic copy of your tax return(s) will be provided to you for your files. Additional copies are available for a fee (\$25 minimum). These fees may apply to additional electronic copies for the time and effort involved in providing this service.
- n If you require us to release a copy of your tax return(s) to a 3rd party (e.g. mortgage lender) we require documented permission. A postage and/or processing fee (\$25 minimum) may be invoiced.
- n The IRS recommends that you keep your tax return and documentation for a minimum of three years. We recommend seven years. There is no hard fast rule except that the IRS expects you to be able to answer questions regarding records for anything that is currently open or subject to review.

Privacy Policy Notice:

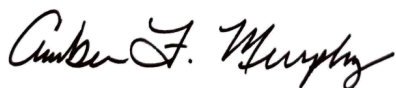
- n **Privacy Policy:** *The nature of our work requires us to collect certain nonpublic personal information about you from various sources. We collect financial and personal information from applications, work-sheets, reporting statements, and other forms, as well as interviews and conversations with 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.*
- n 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. We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as instructed by you in writing or as required by law as listed below:
 - u Requirements to comply with federal, state, or local law.
 - u Requirements to comply with national, state, or local licensing rules.·Requirements to disclose information in response to legal subpoenas.
 - u Items you permit or request us to disclose, as authorized by you in writing.
 - u Information that you authorize us to disclose by signing this engagement letter to electronically file your tax return.

Signatures:

By signing below, 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. By signing, you also acknowledge receipt of our Privacy Policy. **For a joint return, both the taxpayer and spouse must sign (except for a surviving spouse).**

Thank you for the opportunity to serve you. If you have any questions, please contact us!

Letter of Engagement Authored and Offered by Amber F. Murphy, EA



2020Engagement Accepted by Taxpayer(s):

Taxpayer's Signature

Spouse Signature

Taxpayer's Printed Name

Spouse's Printed Name

Date Signed

Date Signed

OFFICE USE ONLY:

Accepted by MWM Representative:

MWM Representative Signature

MWM Representative Printed Name

Date