

Dear Client:

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements.

We will prepare your 2018 federal and state income tax returns from information which you will furnish to us. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. We will furnish you with questionnaires and worksheets to guide you in gathering the necessary information. Your use of such forms will assist in keeping the fee to a minimum.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, canceled checks and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them. **Please read the attached form regarding dates and information to prepare your tax.**

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations and/or irregularities, should any exist. We will render such accounting and bookkeeping assistance as determined to be necessary for preparation of the income tax returns.

The law provides various penalties that may be imposed when taxpayers understate their tax liability. If you would like information on the amount or the circumstances of these penalties, please contact us.

Your returns may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred.

Our fee for these services will be based upon the amount of time required at standard billing rates plus out-of-pocket expenses. All invoices are due and payable upon presentation.

If the foregoing fairly sets forth your understanding, please sign the enclosed copy of this letter in the space indicated and return it to our office. However, if there are other tax returns you expect us to prepare, please inform us by noting so at the end of the return copy of this letter.

We want to express our appreciation for this opportunity to work with you.

**If you can't e-sign then please print your name, sign, date and upload to Onvio or email to [info@scott-aderholt.com](mailto:info@scott-aderholt.com) with your name and "Engagement Letter" in the subject line. Read below and check the box after you have read all the information.**

Very truly yours,

Scott & Aderholt, PLLC



Accepted By: \_\_\_\_\_

Signature: \_\_\_\_\_

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



**SCOTT & ADERHOLT, PLLC**  
CERTIFIED PUBLIC ACCOUNTANTS

*Important information to prepare your 2018 tax return:*

	<b>Partnerships &amp; S-Corps</b>	<b>Individuals &amp; C-Corps</b>	<b>Trusts/Estates</b>	<b>Non-Profit</b>
Tax Documents Due	February 18	March 13	March 13	April 15
E-File Authorizations Due	March 13	April 12	April 12	May 13
Filing Deadline	March 15	April 15	April 15	May 15
Extended Return Tax Documents Due (Extensions only after this date)	August 15	September 16	August 1	July 15
\$400 Rush Fee added if any information received after this date	August 16	September 17	September 2	July 16
Final Tax Return Due Date	September 16	October 15	October 1	August 15

**\* Special cases may exempt you from automatic extension and \$400 rush fee.**

- We require a signed engagement letter and all your tax information to start preparing your return
- Returns are completed in order as they come in
- If you are a returning client your tax organizer will be completed through Onvio unless requested otherwise
- If you are a new client, we will email you a pdf tax organizer
- By default, we do not review your completed return with you. It's not that we don't like you it's just a busy time of year for us. You may schedule a 15-minute appointment to review your return. Here is the link:

<https://aderholtschedule.as.me/taxreturnreview>

I have read all of the important information to prepare my tax return

Select yes if you would like a care-free winter/spring and extend your tax return