**ENGAGEMENT LETTER FOR TAX PREPARATION AND/OR TAX PLANNING PASADENA TAX SERVICES DATE**

**Legal Name (s)**

**Address**

**Email Preferred Phone #**

Thank You for selecting PASADENA TAX SERVICES to assist you with your needed tax work. This letter confirms the terms of our engagement with you and the nature and extent of services we will provide. We will prepare and submit for e-filing your federal and state(s) income tax returns using information you provide to us for the tax year(s) listed here: Any additional returns that you may be required to prepare and file for any tax authority are not part of this engagement.

Your full co-operation and assistance in preparing your tax returns is essential for our best results. You should keep all supporting documents that may be required to prove accuracy and completeness to a taxing authority for seven years. Our work will include accounting and analysis necessary for your tax preparation and we may ask you to clarify certain items you furnish to us, but we will not audit or otherwise independently verify any of the information and documents. It is very important that ALL of your information be presented at one time to prevent unnecessary reworking and higher fees.

We have also agreed to provide you with certain tax planning services that are related to the preparation of the tax returns listed above. There are many areas of our financial lives that can be addressed while dealing with our tax preparation; please consider these before our meeting.

The law imposes steep penalties on taxpayers and tax preparers for failing to disclose participation in “reportable transactions,” that is, certain arrangements the IRS deems potentially abusive. We will insist on all such transactions be properly disclosed and not allow any understatement of tax liability.

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. You agree to honor our decisions regarding the need to make protective disclosures in your returns.

Our engagement will be complete once we deliver to you the completed tax returns, your original documents and received your preparation fee. If you provide banking information for use with our usual e-filing process; we verify amounts to be paid or refunded to you and upon payment of our firm’s fees the returns are e-filed. There is no extra charge for e-filing.

Our fee for preparation of your tax returns will be based on the amount of time required at standard billing rates plus small increases to these fees as tax deadlines are passed from April to October. Extraneous work required above and beyond the normal course of preparation will be billed at $50. an hour. We have also agreed that our firm will be paid on a timely basis for the cash disbursements we reasonably incur in the course of an audit representation or any other tax service that may be required besides annual tax reporting.

To affirm that this letter correctly summarizes your understanding of this engagement, please sign where indicated below and return one signed copy to us. We appreciate your confidence and trust in our firm and as always, love to receive and reward your referrals. Should you have any questions about any of the provisions set forth in this letter, please feel free to contact us: **626.798.7948** or send an email to [help@pasadenataxservices.com](mailto:help@pasadenataxservices.com) . Also, many of your questions may be answered on this website: Pasadenataxservices.com.

Looking forward to working with you on behalf of Pasadena Tax Services**;**

Bernice E. Brightbill,

ACCEPTED AND AGREED TO BY

**Complete Name of Client(s)**

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