

## ENGAGEMENT LETTER

TAX YEAR(S) \_\_\_\_\_

Thank you for choosing The Tax Team LLC to assist you with your income tax returns. 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. 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 individual Federal and State income tax returns for the listed year(s). Your returns will be prepared without verification, solely from information provided by you, and will be prepared in accordance with the appropriate Federal and State income tax laws and regulations. Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

In order to prepare an accurate return ample time is required after receiving all required information/forms. Our work does not include any procedures designed to discover false entries or other irregularities, should any exist. The law provides various penalties that may be imposed when taxpayers provide false information and/or underestimate their tax liability. If you receive any correspondence from the IRS or any State, you agree to contact us immediately and provide copies of any notices.

In signing this letter, you are stating that you have proof of all information provided to The Tax Team LLC, including mileage logs and receipts where required. You acknowledge that you have reported all income you received including barter, consumer-to-consumer activity, cash-based income, foreign income and assets and all other income whether received in-person, in-kind or electronically for the listed year(s). You also confirm that you have or will timely file any applicable required Forms 1099 and W-2 with the applicable government agency for business employees, contractors, and/or home-workers. You also confirm that you have reported ANY AND ALL cryptocurrency and/or digital asset or blockchain activity. We want to remind you that you have the ultimate responsibility for your income tax returns and therefore, you should review them carefully before signing and filing the returns.

Our engagement will be complete upon the delivery of the completed tax return to you. You will be responsible to file the return(s) with the taxing authorities unless we are electronically filing the returns for you. If we are electronically filing your return(s) it is YOUR responsibility to timely return the signed authorization Form 8879 to us. We cannot file the return without it. If you are taking it home to be signed you are responsible for returning it to us before the due date of the return. In the event information is requested by either of the parties on a joint return, that information will be furnished without obtaining the additional consent of the other party. In addition, any document excluding the 8879 signed by any party on the return is considered signed and accepted by both parties. The 8879 and any State required eFile document MUST be signed by both parties.

\_\_\_\_\_  
Taxpayer Initial

\_\_\_\_\_  
Spouse Initial

Our fees for tax preparation services will be based upon the forms and schedules needed to complete your specific forms & return(s). All tax preparation fees are due and payable at the time you pick up the completed return(s). If you choose to have us mail your return to you it will be mailed priority mail and the cost will be added to your tax preparation fees. In signing you agree that we can turn your account to collections if necessary. If any dispute arises you agree to mediation and arbitration to settle the dispute and if a solution can not be reached the dispute can be moved to small claims court in Clackamas County. Client waives right to request a jury trial and remove the matter from small claims court. A judgment in small claims court is binding and there is no right of appeal. Liability of The Tax Team, LLC is limited to the fee collected for preparation of the contracted returns.

Beginning in 2026 we will no longer be offering Protection Plus coverage on our returns automatically. You have the option to purchase the coverage for your personal return if you choose at an additional cost. If you have a complicated return or feel that you would like this coverage, please let us know and we can assist you in setting it up. Tax preparation cost does not cover responses to IRS, Oregon, or any other tax body letters, phone calls, or representation. Your preparer can assist you with letter responses, phone calls, and/or filings but there will be an additional cost for their time.

After preparation, you will receive a copy of your completed tax return(s) and your original documents (except Fed & State copies of W2 and 1099). You should securely store these records, along with all supporting documents, cancelled checks, etc., for 4 years (asset purchases require up to 4 years retention after disposal of asset). These items may later be needed to prove accuracy and completeness of a return. We will retain copies of your records and our work papers for your engagement for 4 years, after which these documents will be destroyed. If you wish additional copies or faxing of returns or data the fee will be a minimum of \$50. Our tax preparation fees do not include additional time for bookkeeping and/or audit preparation, assistance, or representation.

To process and electronically file your tax return, we must disclose your tax return information to A-1 Income Tax & Bookkeeping Inc., Dynamic Tax & Books LLC, and Gaylen Evans LLC, with whom we partner to provide e-filing services. You also agree to disclosure of relevant information including but not limited to tax return information, contact information, and banking information in the event we use Protection Plus services on your behalf. Separate consent to initiate Protection Plus services will not be provided or required. If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by e-mail at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

We CAN NOT automatically file an extension for you. You can request an extension via email, mail, or phone. We must receive the request by noon on the due date or you can file your own extension by going to [IRS.gov](https://www.irs.gov). Returns filed with a balance due will be subject to interest and penalty by all taxing authorities after the due date if no payment is made. EXTENSIONS ARE FOR TIME TO FILE, NOT TO PAY.

To affirm that this letter correctly summarizes your understanding of the engagement, please sign in the space indicated.

\_\_\_\_\_  
Taxpayer Print

\_\_\_\_\_  
Taxpayer Sign

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse Print

\_\_\_\_\_  
Spouse Sign

\_\_\_\_\_  
Date