

ENGAGEMENT LETTER FOR INDIVIDUAL TAX PREPARATION SERVICES

PRINT NAME(S)

- I am retaining Lottsa Tax & Accounting Services, Inc. (Lottsa) to prepare my 2017 individual income tax return from the information that I am providing.
- I have carefully and completely gathered the information for my tax return. Those facts and materials are hereby forwarded to Lottsa.
- I believe that I am reporting all income subject to tax.
- I believe that all of my claims for deductions are valid and can be substantiated.
- I have qualified written acknowledgment for any charitable contributions \geq \$250 being claimed which include the statement that "no goods or services were provided in return for this donation".
- I am aware that records and documents supporting claims of Income and Deductions must be retained.
- If applicable, I have contemporaneous daily records for business vehicle use, travel, meals and entertainment, and for the use of "listed property".
- If my foreign holdings were \geq \$10,000 during the tax year, I am providing information about those positions.
- I understand that, as paid preparer, Lottsa is not auditing our information. Lottsa does not attest to its completeness or its accuracy. That is my responsibility.
- I know that tax returns are subject to review by tax authorities. Lottsa is available to help if there is an inquiry or audit. I understand that additional fees apply for audit replies and representation.

I understand that **the tax return will be prepared for electronic filing with IRS and the appropriate state tax authority.** Transmittal will not occur until we review the completed tax forms and return the signed **E-file Authorization Form to Lottsa.**

I understand that tax services will be provided at the firm's hourly rates as stated on the company's website. Further, it is agreed that I will pay the invoice promptly and in full upon completion of the tax preparation services.

If utilizing the Earlybird Discount, I understand that my Tax Organizer and all of the tax materials that are in my power to produce must be turned in by February 10th to be eligible.

By initialing here I agree to receive my copy of the 2017 tax return as a PDF data file through Smart Vault. By not initialing, I prefer that a printed copy be provided to me. Lottsa will retain PDF copies of tax returns if you should need to access them in the future.

_____/_____/20_____/_____/20
Taxpayer's Signature Date Spouse's Signature Date

Lottsa will carefully handle the tax materials that you provide to us for preparation and processing of your tax return. Lottsa will process the tax return as quickly, completely, and efficiently as we are able.

Lottsa will retain the originals or copies of the Tax Organizer, tax worksheets, and supplemental communications in order to document and support the figures used in preparing the tax return.

Lottsa will return other original documents to you. We may retain copies of forms that we believe to be materially important to the assertions in the tax return.

Lottsa will comply with the rules of IRS Circular 230 governing ethical conduct of tax practice.



Scott Beers, E.A. CFP®, President of Lottsa

WWW.LOTTSA.COM