



Thank you for choosing **Saldaña's Tax & Bookkeeping Service, LLC** to assist you with your taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

This letter is to inform you, the taxpayer, of the services I will provide you, and the responsibilities you have for preparation of your tax return.

Tax Return Preparation

- I will prepare your Federal and State tax returns based on information you provide. Services for preparation of your return does not include auditing or verification of information provided by you.
- This engagement does not include any audit or examination of your books or records. In the event your return is audited, you will be responsible for verifying the items reported.
- The tax return preparation fee does not include bookkeeping unless we have already established a Fixed Price Agreement.
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
- Preparation fees do cover limited assistance and consultation during the year.
- The engagement to prepare your annual Tax Returns terminates upon delivery of your completed returns and original documents to you. Please store your supporting documents and copies of your tax returns in a secure place for at least seven years.

Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the return carefully before signing to make sure the information is correct.
- Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required for preparation of late returns.

Signatures. To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please proceed with uploading your documents to the secure site. I will begin working on your return and contact you to schedule an appointment to review and sign.

Privacy Policy. The nature of our work requires us to collect certain nonpublic personal information about you from various sources. Financial and personal information is collected from applications, worksheets, 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.

Procedures and policies are in place to protect your confidential information. Access to your confidential information is restricted. Your personal information will not be disclosed to any third party without your express permission, except where required by law. Physical, electronic, and procedural safeguards are maintained in compliance with federal regulations that protect your personal information from unauthorized access.

Please contact us with any questions regarding our privacy policy.