



ENGAGEMENT LETTER FOR TAX CLIENTS

Thank you for allowing Maceyko Tax Inc. to prepare your tax return. We appreciate your business and will work hard to make sure you are satisfied with our services. Our goal is to get you the best result possible and provide you with customer service that will set us apart from any other preparer.

This letter will outline what you can expect from us as well as what we need from you to provide you with excellent service and accurate results; it will also cover our policies, procedures and services. The signatures you provide indicate your consent to the terms of our engagement letter and that you agree to have us prepare your return(s).

We know your privacy is important to you, and we recognize that the information we must collect from you to prepare your Tax return is sensitive and personal. As a result, we do not disclose any information about you to anyone and we maintain safeguards to ensure this protection. For more details, please contact us.

Our commitment to you: We will prepare your tax return(s) in a professional manner for a reasonable price. For our new Clients, we do a thorough interview to learn the details of your life situation that will affect your taxes. For our returning Clients, we update current information and ask questions of any changes that might have occurred during the year.

Maceyko Tax uses advanced technology in preparing your return. Our software provides us with constant tax updates, multiple layers of security, and allows us to e-file your return. This relieves you from the hassle of mailing in your return and also provides a faster refund. Our software also allows us to provide you with an electronic copy of your return via PDF format.

We will maintain copies of your submitted documents for the Federal period of the statute of limitations – 3 years. After that, your files and documents will be destroyed. It will be your responsibility to maintain any records that may have an impact on your future. All original documents will be returned to you after the tax return is prepared.

We will not audit or verify the data you submit to us, although we may ask you for clarification when necessary. All the information you submit to us, to the best of your knowledge, will be correct and complete and include all other information necessary for the completion of your tax return.

Your commitment to us: Our fee structure assumes that you gather your tax information in an orderly manner and you complete ALL documents given to the best of your ability. Your use of the forms provided will help adhere to the IRS standards and assist us in keeping our fee to a minimum.

We will require supporting documents (W-2's, 1099's, etc.) that will help us accurately record your income, credits and deductions. You agree to provide this needed information to the best of your ability.

As you can imagine, the weeks leading up to the tax deadline are very busy for us. We operate on a first-in/first-out basis. If you want to file your return by the deadline, **we require that you provide ALL documentation 15 days prior to any tax deadline** (March 15th, April 15th, September 15th or October 15th.) If you do not submit the requested documents by this 15-day deadline AND wish to file the return by the IRS deadline, Maceyko Tax will impose a **rush fee of \$100** in addition to your tax prep fee. No work will begin until **ALL** documentation is received.

If you need more time to organize your documentation, you can request an extension to the IRS. In doing so, you will avoid paying any failure to file penalties. However, if you owe taxes, you will be charged interest and penalties for filing after the initial due date. We encourage mailing an estimated tax payment before the deadline. If you would like Maceyko Tax to file the extension on your behalf, you will be charged a fee of \$50. A written request for the extension is all that is needed to show your consent.

To our business clients: You are required to keep adequate records regarding your business. Please understand that “adequate records” is a diary or log book that gives details about expenses. Understand that a log is required for travel, meals, entertainment, vehicles and miles, computers, home office, gifts, sales promotions and education. This log includes date, place, and purpose with the name of the person you may have purchased the item for. If you lack receipts for these expenditures, then the IRS will not allow the deduction. The IRS will almost always ask questions about bartering transactions. It is your responsibility to have legible receipts, cancelled checks, and any other supporting documentation required.

GUARANTEES:

Maceyko Tax guarantees that if you are audited for a return we prepared, we will assist you by answering questions about how we arrived at the amounts in your return. We will be available upon request to represent you, or to review the results of any examination. Billing for these additional services will be at our standard rates.

It is your responsibility to carefully examine and approve your completed tax return before signing it or the 8879 e-file authorization form. In the event of an audit or other inquiry, you may be requested to produce documents, records, or other evidence to substantiate the items of income and deduction shown on your tax return. Maceyko Tax does not maintain copies of your original documents. It is your responsibility to retain possession of your completed tax return and all documents and records substantiating this information for a period of seven years and provide such information, if required, for an audit examination.

PAYMENT: Our fees are based upon a combination of our standard rates for the type of forms and schedules required to be filed, the time incurred to prepare the return, how organized you provide the data, and out-of-pocket expenses. Existing clients should expect that preparation cost will be a little higher than last year due to the new IRS tax law requirements, provided that the required forms/schedules remain unchanged. Should additional forms/schedules be required to file, our fee will increase. New clients will receive and approve a cost estimate, based on their prior year tax return, prior to completing your return. Payment will be collected in full prior to filing your return electronically. If for any reason the payment for our invoice has not been received within 10 days of receipt, Maceyko Tax may impose a 12% financial charge annually. If payment is received with non-sufficient funds, a \$35.00 bank fee will be added, and Maceyko Tax has the right to be reimbursed for any cost of collection of funds.

Additional fees may be charged if the client submits information several times (changing the same numbers previously submitted). Maceyko Tax is in no way responsible for the origin or amount of any of the figures that you supplied. For efficiency purposes, we request that clients provide us electronic copies of their information.

If the above is in accordance with your understanding of the terms and conditions of our agreement, please sign and return a copy of this letter.

Client Signature _____ Date _____

Client Signature _____ Date _____
