



Subject: Engagement Letter

Thank you for choosing Simply Tax Inc to assist you with your 2023 taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

As we prepare your 2023 income tax returns, we will depend on you to provide the information needed to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. An Organizer is available on our website, www.simplytaxinc.com, to help you collect the data required for your return. By using it, you will contribute to the efficient preparation of your returns, help minimize the cost of our services and avoid overlooking important information.

We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will inform you of any material errors, fraud, or other illegal acts we discover.

The law imposes penalties when taxpayers underestimate their tax liability. Call us if you have concerns about such penalties. Also, 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.

Our fee is based on the time required at standard billing rates plus out-of-pocket expenses. Invoices are due and payable upon presentation. All accounts not paid within thirty (30) days are subject to interest charges to the extent permitted by state law.

In connection with information and or document requests from this office and in the event that you fail to communicate with this office and the condition continues for ten (10) business days from our requested deadline date, verbal or written, we reserve the charge a surcharge in addition to the preparation fee stipulated in this agreement or terminate our services. The surcharge fee for rushed processing is \$150 per tax return.

We will return your original records to you at the end of this engagement. Store these records, along with all supporting documents, canceled checks, etc., in a secure location in case these items are needed later to prove accuracy and completeness of a return. We retain copies of your records and our work papers for your engagement for seven years, after which these documents will be destroyed.

Our engagement to prepare your 2023 tax returns will conclude with the delivery of the completed returns to you (if paper-filing) or your signature and our subsequent submittal of your tax return (if e-filing). If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, sign the enclosed copy of this letter in the space indicated and return it to us with your tax documents. Thank you for the opportunity to be of service. If you have any questions, contact our office at 616-796-8010.

Sincerely,
Patricia Diekema, EA
Simply Tax Inc

Accepted By: _____
Taxpayer Date Spouse Date

Print Name: _____
Taxpayer Spouse