



Christopher Rees

Mail: P. O. Box 100393
Denver CO 80250

Fax: (303) 282-6266

Web: ReesNet.com

Email: Chris@ReesNet.com

Phone: (303) 777 - 7399

ENGAGEMENT LETTER

Subject: Preparation of Your Tax Returns for year _____

Specify Tax Return To Be Prepared: _____

(One engagement letter must be submitted for one return, for example, 1040, 1065, 1120S, 1120, 1099, etc.)

Thank you for choosing me to assist you with the preparation of your tax returns. This letter confirms the terms of my engagement by you and outlines the nature and extent of the services I will provide.

I will prepare your federal and state tax returns. I will depend on you to provide the information I need to prepare true, correct, complete, and accurate returns. I may ask you to clarify some items but will not audit or otherwise verify the data you submit. I will assist you in collecting the data required for your return. I will help you avoid overlooking important information. By furnishing the documents I request, you will contribute to efficient preparation of your returns and help minimize the cost of my services.

I will perform accounting services only as needed to prepare your tax returns. My work will not include procedures to find defalcations or other irregularities. Accordingly, my 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. I will, of course, inform you of any material errors, fraud, or other illegal acts I discover. The law imposes penalties on taxpayers who underestimate their tax liability. Please call me if you have concerns about such penalties. Should I encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, I will outline the reasonable courses of action and the risks and consequences of each. I will ultimately adopt, on your behalf, the alternative you select.

My fee will be based on the number and complexity of required forms priced at standard billing rates. Invoices are due and payable upon

presentation. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (30) days.

I will return your original records to you at the end of this engagement and after your invoice has been paid in full. You should securely store these records, along with all supporting documents, canceled checks, etc., as these items may later be needed to prove accuracy and completeness of a return. I will retain copies of your records and my work papers for your engagement perpetually. I will share tentative copies of your returns by emailing them to you. If you do not have an email address, I will share tentative return results with you by telephone or by fax.

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

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign and return to me a copy of this letter in the space indicated and return it to me before, or at, our first meeting.

I deeply and sincerely appreciate your confidence in me. Please call if you have questions or concerns. I remain, assuredly and forever,

Your faithful servant,

Christopher Rees

(Both spouses must sign and date for preparation of joint personal returns. **All principals must sign, date, and submit separate copies of this letter for the preparation of non-personal returns [i. e., 1065, 1120S, 1120, 1099, etc.]**)

Accepted By:

Taxpayer _____ Date _____

Spouse _____ Date _____