



Terms of Agreement of Service

Thank you for selecting Taximum to assist you with the preparation of your tax returns. This letter confirms the terms of our engagement with you and the nature and extent of services we will provide.

We will prepare and electronically file your 2020 (or previous year) federal and applicable state income tax returns you request using information you provide. We may ask for clarification of some items.

It is your responsibility to provide information required for preparation that is complete and accurate. We must receive all information to prepare your taxes at least a week prior to April 15, 2020 to ensure we can complete your taxes in prior to the IRS deadline. If your return is not completed prior to April 15th, you may be subject to and responsible for late filing or late payment penalties.

You should keep all documents, canceled checks and other data that support your reported income and deductions. They may be necessary to prove accuracy and completeness of the returns to a taxing authority. You are responsible for the returns, so you should review them carefully before you sign them.

You will contact us immediately if you discover additional information that will lead to a change in your return, or if you receive any letters from the IRS, state, or local taxing authorities. If you receive a notice about your tax return, please notify us immediately so that we may prepare a timely response.

We will not audit or otherwise verify any information. We are not responsible for disallowed deductions, or the inclusion of additional unreported income or any resulting taxes, penalties, or interest.

Your returns may be selected for inquiry, examination, or audit by a taxing authority. In the event of a tax examination, we can arrange to be available to represent you. Such representation will be a separate engagement for which an engagement letter will be provided to you and may result in additional fees.

We will retain copies of records you supplied to us along with my work papers for your engagement. All your original records will be returned to you at the end of this engagement. You should keep the original records in secure storage. The work papers prepared by us shall remain the property of Taximum. My fee for preparation of your tax returns will be based on the forms and schedules included in your returns.

If this letter correctly summarizes your understanding of the arrangements for this work, check the box below and click NEXT to provide your e-signature in the space indicated. We appreciate your confidence in us.