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Accountingservicesofyork.com

*"We'll count the beans... you enjoy the coffee."*

**TAX PREPARATION ENGAGEMENT AGREEMENT**

\*Receipt totaling price is \$125 per hour.

This agreement confirms you have asked our firm to perform tax return services, and the terms under which we have agreed to fulfill that request. Please read this carefully, as it is important to both our firm and you, that you understand the limitations of the services you have asked us to perform.

We are responsible for preparing only your Federal, Pennsylvania and/or Local tax returns. If there are additional state returns you wish us to prepare, please list them here \_\_\_\_\_. If you have derived income from a foreign country, we will use the foreign country income information which you provide to calculate any applicable federal or state foreign tax credit or other affected federal or state income tax items. However, you are responsible for meeting any foreign country income tax or other foreign country reporting requirements. All other returns, such as sales tax, property tax, inheritance, gift or estate tax, will require a separate agreement and be billed accordingly.

We will not audit or otherwise verify the data you submit, although we may ask you to clarify information as necessary with tax organizers and questionnaires. It is your responsibility to carefully examine and approve your completed tax returns before signing and mailing/electronically sending them to the tax authorities. We are not responsible for the disallowance of doubtful deductions or inadequately supported documentation, nor for resulting taxes, penalties, and interest. We will rely, without further verification, upon information you provide to us from 3<sup>rd</sup> parties, including but not limited to K-1s, 1099s, 1098s, receipts and similar items. We are not responsible for any failure to report any forms to the IRS that were not provided to us, or that we were not informed of.

Per our **Privacy Policy**, we do not disclose any non-public personal information about our customers or former customers to anyone, except as instructed to do so by said customers (a Release Form must be signed) or as required by law. We restrict access to non-public personal information, and maintain physical, electronic, and procedural safeguards to protect your non-public personal information. It is our policy to keep electronically scanned records and to return all physical papers to you at completion of services rendered under this engagement. It is your responsibility to retain and protect your records for potential future use, including potential examination by any government or regulatory agencies. In the event you misplace your tax return itself, we will gladly print a copy for \$50.00 per return or you can get it free in your Smart Vault Account.

**Payment is expected upon completion of your tax return. We will not file your tax return(s) until the appropriate forms are signed and the invoice is paid in full.** Billings become delinquent if not paid within 30 days of the invoice/completion date. If billings are not paid within 60 days of the invoice date, we may, at our election, withdraw from this engagement. You acknowledge and agree that in the event we cease work or withdraw from this engagement as a result of your failure to pay on a timely basis for services rendered as required by this engagement letter, we shall not be liable to you or your agents for any damages that occur as a result of our ceasing to render services, and that we can/will notify the IRS of the inaccuracy in reporting ASY as the paid preparer on your tax return in accordance with various IRS code sections and Circular 230 Federal Code of Regulations. You also agree and understand a 25% collection fee can/will be assessed and added to your invoice total at any time after 60-day delinquent. Any and all fees assigned to Accounting Services of York from collection agencies and/or banks or credit card processors regarding or resulting from your account, as well as any late, interest or penalty fees assessed to the client from Accounting Services of York itself, will be the sole responsibility of you, the client and become part of the collections process.

Our services will conclude upon delivery of the completed income tax returns discussed above or upon our suspension of services or resignation from the engagement. We appreciate the opportunity to serve you. Please date and sign this form to acknowledge your agreement with and acceptance of your responsibilities and the terms of this engagement.

Accepted by:

Signature	Tax Payer Name (print)	Date
Spouse's Signature (if applicable)	Spouse's Name (print)	Date

***My signature decrees that I have read and agree with the terms of this engagement agreement.***

If any dispute arises among the parties hereto within, the parties agree first to try in good faith to settle the dispute by mediation administered by the American Arbitration Association under its Rules for Professional Accounting and Related Services Disputes. If the parties are unable to resolve the dispute through mediation within 60 days from the date notice is first given from party to the other as to the existence of such a dispute and the demand to mediate, then they may proceed to resolve the matter by arbitration. Costs of any mediation proceeding shall be shared equally by all parties.