



LETTER OF ENGAGEMENT AND TAX QUESTIONNAIRE
FOR TAX YEAR 2011
(MUST BE COMPLETED AND SIGNED BEFORE TAXES ARE PREPARED)

Client's Name _____

We will prepare your Federal and State individual income tax returns from information provided in the "Income & Deductions Finder" and any supplemental organization system you wish to provide (Tax Organizer, Excel spreadsheets, etc.). Your data will not be audited or otherwise verified, although we may ask you to clarify some of it or furnish us with additional data.

When possible, questions involving application of tax rules will be resolved in your favor, if there is reasonable justification for doing so.

Your returns are subject to review by taxing authorities. In the event of an examination or other contact, we are available to represent you. You may appeal any adjustments proposed by an examining agent. Our fees for these additional services will be arranged in a separate engagement letter. If you elect to purchase the "Tax Maintenance Agreement" a portion or possibly all of the additional audit representation fees may be covered. Please refer to the terms and limitations of the agreement for detailed information.

We are responsible for preparing the tax returns listed above. We guarantee that your tax return will be completely accurate and correct based upon the information you provide at the time of preparation. If there is ever a problem with your return, we will fix it and pay any penalties incurred due to our mistake. However, you understand that we are not responsible for information that was not furnished to us, or the disallowance of deductions by the IRS or state authorities due to inadequately supported documentation, nor for any resulting taxes, penalties, and interest. Any additional work done in conjunction with IRS or state authorities will be billed at our standard rates at that time.

Our professional judgment will be used in preparing your tax returns. When we are aware that applicable tax law is unclear or that conflicting interpretations of the law by the courts and tax agencies exist, we will explain the positions that may be taken on your returns. We will follow whatever position you request on your return so long as it is consistent with the codes, regulations, and interpretations that have been issued. If the IRS or state tax authorities should later contest the position taken, there may be an assessment or additional taxes plus interest and penalties. We assume no liability for any such assessment.

We will electronically file your tax returns at no additional charge to you. This is the fastest, most convenient and the most secure way to insure that the taxing authorities receive your returns in a timely manner. However, the identification process used when filing returns electronically makes it necessary that the **last name and social security number you provide us matches exactly with your social security card.** Incorrect information will result in the returns being rejected by the taxing authority, causing delays in filing and additional preparation by us to resubmit the return. This may result in additional charges being added to the tax preparation fees.

By your signature below, you agree that you have the proper records to substantiate all items of income and deductions, including travel and entertainment expenses and charitable contributions, and that you will carefully examine and approve your completed tax returns before signing the authorization to electronically file those tax returns. If these are joint returns and only one spouse is signing the statement, he or she does so with the authority and consent of the other.

Signature _____

Date _____

Signature _____

Date _____