

Tom Felhofer, CPA

262.628.0301

tom@tomfelhofer.com

Dear Client:

This **Engagement Letter** explains the services and guarantee we offer and our expectations from you for the preparation of your tax return. Please take a moment and read this letter. If you have questions ask us before signing.

1. We will **Assist** you throughout the year, answering your questions, doing planning and providing copies of your returns when needed, for a fee. You are responsible to make us aware of changes in your life that impact your tax return.
2. We will **Accurately** prepare your federal and state income tax return(s) from the information you provide. We accept the information you give us in good faith. Your responsibility is to provide us with all of the information required to prepare your returns **before** we begin preparing your returns. We do not audit the data you provide.
3. We guaranty your **Satisfaction** with our service, backing it up with a money back promise. You are ultimately responsible for the accuracy of your returns and should review it carefully before signing.

By signing below you:

- a) have read and understand our Privacy Policy.
- b) understand that you will receive a copy of your tax returns, as well as all original records.
- c) know that we will be entering a PIN number for your signature on your tax returns.
- d) have verified your bank account number used for direct depositing refund(s).
- e) give us permission to discuss your tax return with the government.
- f) give us permission to e-mail confidential information to you.

If you have read and understand the contents of this engagement letter please sign and date below. If you are married, you are signing below on behalf of you and your spouse.

Thank you for the privilege of allowing us to provide you with year-round tax service.

_____(signature)

_____(date)