



## FRIENDS DOIN TAXES LLC

PO Box 75 LAKE OZARK MO 65049 (mailing)

1005 Jeffries Road Osage Beach MO 65065 (physical)

Phone(573) 365-2006 Fax(573) 365-5004 E-mail Debbie@friendsdointaxesllc.com

### TAX PREPARATION PERMISSION & ENGAGEMENT LETTER

Thank you for selecting Friends Doin Taxes LLC to assist with your tax return preparation. This letter will confirm the arrangements and general scope of services we provide.

All of your original documents will be returned to you at the end of this engagement. We will retain copies of records you supplied to us along with our work papers for your engagement for a period of three years. You should keep all documents, cancelled checks and other data that support your reported income and deductions.

#### ***Tax Return Preparation***

- We will prepare your 2018 Federal and State tax returns based on information you provide. Services for preparation of your return do not include ***auditing or verification of information*** provided by you.
- This engagement does not include any audit or examination of your books or records. In the event your return is audited, you will be responsible for verifying the items reported.
- You must review the return carefully before signing to make sure the information is correct.
- The tax return preparation fee does not include bookkeeping.
- ***Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required for preparation of late returns.***
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
- Preparation fees do cover limited assistance and consultation during the year.
- The engagement to prepare your 2018 tax returns terminates upon delivery of your completed returns and original documents to you. Please store your supporting documents and copies of your tax returns in a secure place for at least seven years. ***All copies printed, faxed or emailed will have an additional charge of 25.00.***

#### ***Taxpayer Responsibilities***

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.

It may be necessary to prove accuracy and completeness of the returns to a taxing authority. You should keep all original records for a minimum of 5 years, **I recommend 7.** The timeliness of your cooperation is essential in our ability to complete this engagement. Specifically, we must receive information from you in a reasonable period of time prior to the applicable filing deadline.

Accordingly, if we do not receive information from you in a timely manner it may be necessary to pursue an extension of the due date of your returns, and we reserve the right to suspend our services or withdraw from this engagement.

If you file a joint return, because you will each sign the returns, you are each our client. You each acknowledge that there is no expectation of privacy from the other concerning our services and we are at liberty to share with either of you, without the prior consent of the other, any and all documents and other information concerning preparation of your returns. You also acknowledge that unless we are notified otherwise in advance and in writing, we may construe an instruction from either of you to be an instruction on your joint behalf.

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**TAX PREPARATION FEES:** Our fees are based on a price per form/schedule required to complete your return. Additional charges may include: multi-state returns filed, bookkeeping necessary for the preparation of your tax return, tax consultation for estimates, amended tax returns, FAFSA reports, etc. which are identified separately on your invoice. Payment for services is due upon completion of your tax return.

***NO RETURNS WILL BE EFILED PRIOR TO PAYMENT OR PAYMENT ARRANGEMENTS!!!!!!!!!!***

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**OTHER SERVICES:** Bookkeeping, payroll, payroll reports, year-end reports such as W2's and 1099's, business consultation, interim and year-end tax planning. These services are billed separately; you may contact us for our fee schedule.

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Occasionally mistakes are made so please forgive us as we are human. ☺ Be courteous and let us know if you receive any notices from the IRS/State. We will prepare amended return and pay any penalties, if we are at fault. We do not pay the additional tax. Only Penalties.

.Privacy Policy. The nature of our work requires us to collect certain nonpublic personal information about you from various sources. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to any third party without your express permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access. Please contact us with any questions regarding our privacy policy.

**PLEASE REVIEW YOUR RETURNS CAREFULLY BEFORE SIGNING AND FILING THEM. If you have any questions, please ask. Tax Preparation is a partnership. Thank you for**



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## choosing us as your partner, we appreciate the opportunity to work with you now and for many years to come.

Friends Doin Taxes LLC is not responsible for providing any of the deductions taken on my tax return(s). I have provided this information from my own records and I have proof of my deductions and income. I give my permission to Friends Doin Taxes LLC to prepare my tax return(s) and I have read, understand and agree to the terms of this engagement. I have also read the E-file information below and have had an opportunity to review the company's Privacy Policy.

Taxpayer	date
Spouse	date

It is mandatory that you sign IRS Form 8879 after we have completed the return. The return will not be electronically filed until Friends Doin Taxes LLC is in possession of the signed form.

### **BOTH PARTIES MUST SIGN, IF MARRIED FILING JOINTLY.**

### **ALSO PAYMENT OR PAYMENT ARRANGEMENTS MUST BE MET PRIOR TO THE SIGNING OF THE 8879.**

Your refund may be delayed for reasons such as, but not limited to: Random IRS audit, Earned Income Crediteligibility verification, Incorrect Bank Account/Routing number

Your refund may be seized or reduced for reasons such as, but not limited to: Unpaid child support, Back tax sowed, Payments in arrears to any Federal or State Agency such as Student Loan Deficiency.

A return may be rejected by the IRS for reasons such as, but not limited to: Social Security Number issues (ie.Name and Number do not match SSA records), Dependent claimed on another tax return, Invalid/Wrong birthdate.

### **IRS DOES NOT PROVIDE EXPECTED REFUND DATES**

Check [www.irs.gov](http://www.irs.gov) "Where's My Refund" for specific information or the IRS2GO Smartphone App.

### **STATE DEPARTMENTS DO NOT PROVIDE EXPECTED REFUND DATES.**

Revenue websites for more information.

Missouri's Return Inquiry System: <https://dors.mo.gov/tax/taxing/welcome.jsp>

If Electronic Filing of your tax return cannot be or refund any part of your fee.

Occasionally mistakes are made so please forgive us as we are human. ☺ Be courteous and let us know if you receive any notices from the IRS/State We will prepare amended return and pay any penalties, if we are at fault. We do not pay the additional tax. Only penalties

### **Please notify us as soon as you receive a notice, most notices have a due by date attached.**

There are a lot of scams involving so called IRS on the phone and by mail. Please never ever send them any money from a phone call or an email. The IRS will never call you and never email you. There have been many that have been taken advantage of.