



2019 ENGAGEMENT LETTER

Thank you for choosing Fox Cities Tax to assist you with your 2019 taxes. This letter confirms the terms of our engagement with you, and outlines the nature and extent of the services we will provide.

We will prepare your 2019 federal and state income tax returns. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items, but will not audit or otherwise verify the data you submit. We have an Organizer available on our website: www.foxcitiestax.com and in the office. It may help you avoid overlooking important information.

Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal act, though it may be necessary for you to clarify some of the information you submit. We will inform you of any material errors, fraud, or other illegal acts we discover.

The law imposes penalties when taxpayers underestimate their tax liability. Call us if you have any concerns about such penalties.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable course of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

Our fee is based on a combination of fee per form, out-of-pocket expenses, and time required to prepare your returns. Invoices are due and payable upon presentation. Unless specifically agreed upon by us, tax returns will not be electronically filed until our fee is paid and we receive a signed form 8879.

We will return your original records to you at the end of this engagement. Store these records, along with all supporting documents, cancelled checks, etc. in a secure location in case these items are needed to prove accuracy and completeness of a return. We retain copies of your records and our work papers for your engagement for three years, after which these documents will be destroyed.

Our engagement to prepare your 2019 tax return will conclude with the delivery of the completed returns to you (if paper-filing), or your signature and our subsequent submittal of your tax return (if e-filing). If you have not selected to e-file your returns with our office, you will be responsible to file the returns with the appropriate taxing authorities by mail. We recommend certified mail, return receipt requested, to prove your filing date. Review all tax return documents carefully before signing them.

To affirm that this letter correctly summarizes your understanding of the arrangement for this work, sign the enclosed copy of this letter in the space indicated and return it to us. If filing a joint return, both spouses must sign.

Thank you for the opportunity to be of service. If you have any questions, contact our office at 920-558-4683.

Signature

Signature

Date

Printed Name

Printed Name