

Wheeler's Tax Service

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Subject: Preparation of Your 2021 Tax Returns

Thank you for choosing Wheeler's Tax Service to assist you with your 2021 taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

Tax Return Preparation

- ~ We will prepare your 2021 federal and state income tax returns based on information you provide. Services for preparation of your tax return do not include auditing or verification of information provided by you. An Organizer may be provided to help you collect the data required for your return at your or our request. The Organizer will help you avoid overlooking important information.
- ~ 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.
- ~ The tax return preparation fee does not include bookkeeping. Should you need these services, it is a separate engagement with its own engagement letter and fee structure.
- ~ Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities. Correspondence from taxing authorities has been increasing significantly. For this reason, we now offer an audit & Correspondence Plan. Through April 15, 2022 or the filing of your tax return, whichever is later, you have the ability to sign up for Correspondence Coverage at a cost of \$30. This cost will cover any correspondence relating to 2021 regardless of which calendar year it's received in. After April 15, 2022, if you receive correspondence from taxing authorities that needs to be addressed and you have not signed up for the Correspondence Plan, addressing these letters will be charged at our hourly rate of \$160/hour with a minimum charge of one half hour.

I/we choose to ENROLL in the Correspondence Plan for \$30.

I/we choose to NOT enroll in the Correspondence Plan.

Taxpayer signature & date

Spouse signature & date

Both spouses are required to sign for a joint return

- ~ Preparation fees do cover limited assistance and consultation during the year. However, tax planning and/or calculating customized estimates are subject to a separate fee.
- ~ Information you provide will be kept confidential. However, our discussions are not protected by any form of attorney-client privilege. We will advise you to consult with an attorney at any time we feel it may be appropriate.
- ~ The engagement to prepare your 2021 tax return terminates upon delivery of your completed tax returns and original documents to you and receipt of your signature on e-file authorization forms. Please store your supporting documents and copies of your tax returns in a secure place for at least seven years. Some tax situations may require you to retain your records for a longer period of time. You may be assessed a fee if you request a copy in the future.

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 keep all of the 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 either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.

- ~ You must review the return carefully before signing to make sure the information is correct.
- ~ Fees shall 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 time spent.

Signatures

By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities, and that you understand our responsibilities in preparing your tax returns as explained above. For a joint return, both taxpayers must sign.

Thank you for the opportunity to be of service. If you have any questions, contact our office at info@wheelerstax.com or (920)731-7859.

Sincerely,
Wheeler's Tax Service

Accepted By:

Taxpayer (print and sign)

Spouse (print and sign)

Date