



TAX SERVICES LLC

2023 Individual Income Tax Preparation Engagement Letter

This letter is to inform you, the taxpayer, of the services we will provide you, and the responsibilities you have for preparation of your tax return.

Tax Return Preparation

- We will prepare your 2023 federal and 1 (one) 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.
- The tax return preparation fee does not include bookkeeping.
- Fees charged for tax return preparation do not automatically include audit representation or preparing materials to respond to correspondence from taxing authorities. It is to the preparer's discretion to assist or not.
- Preparation fees do cover limited assistance.
- The engagement to prepare your 2023 tax returns terminates upon delivery of your completed returns.
- Please store your supporting documents and copies of your tax returns in a secure place for at least seven years.
- The Tax Preparer does not work for nor with the IRS or any state agency. **The Tax preparer acts as the transmitter of your tax return and assumes no liability in the processing of the return after it is submitted and accepted by the IRS and State(s).**

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.



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- Documents are to be uploaded to a secure drive. You will receive an invitation where you will create an account.
- 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 confirming submission to make sure the information is correct.
- A Deposit of \$55 is due prior to engagement of gathering information or documentation and tax preparation. And applied to your total tax preparation fee.
- Upfront Fees must be paid before your tax return is submitted for you.
- “Pay Later”/Refund Transfer Fees are deducted from the return in addition to the initial Tax Preparation Fee.
- Total Fees will be determined and stated **AFTER** all documents/information is received and reviewed and **BEFORE** the start of the tax return preparation.
- Payment method will also be discussed **BEFORE** the start and submission of tax return preparation.

Tax Preparation Fees

Individual (Personal) Tax Returns:

Form 1040 + 1 (one) State Return

W2/1099R/Social Security Income Only without Dependents:

Starts at \$122 per Individual

W2/1099R/Social Security Income Only with Child(ren) qualifying for the Earned Income Credit (EIC) and/or child tax credit (CTC) OR Other Dependents without Income:

Starts at \$222 per Individual



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W2/1099R/Social Security Income Only with Dependents With Income (Social Security/Retirement):
Starts at \$333 per Individual

*Married Filing Jointly with no income for one spouse is charged as one individual**

Additional Schedules

Schedule A- Itemized Deductions: \$88

Schedule C-Self-employed Income: \$111 per schedule

Form K-1: \$55 per form

Schedule D- Capital Gains/ Losses Transaction: \$55 + \$5 per transaction for more than 3 Transactions

Schedule E- Supplemental Income: \$88

Schedule F- Farming Income/Expenses: \$111

Additional States

\$55 per state

Additional Services:

Printing: starts \$33

Mailing: Starts at \$22

Paper Filed Returns: \$55

Extension Only: \$55 credited towards tax preparation fees if filed with us. NON-Refundable if not.

If Taxpayer qualifies for “File now, Pay Later”/Refund Transfer Option, the Fee is Paid to Bank (Not to QTax): \$64.95



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This engagement is for **Tax Preparation purposes only** and does not include any other services from QTax Services LLC. Accounting and Consulting services are retainer/project based and paid for monthly/hourly. Shaquana Sutton/QTax Services LLC is **NOT** your Accountant unless there is an accounting agreement in place.

By signing this document, you agree that the engagement with QTax Services LLC as your Tax Preparer for 2023 Tax Preparation.

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.

Taxpayer

Spouse (If Applicable)

Date

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.

Last 4 of SSN: