



Certified Public Accountants

ENGAGEMENT LETTER FOR TAX CLIENTS

Thank you for choosing Maceyko Tax Inc. to assist with your tax preparation. We truly value your business and are committed to providing exceptional service to meet your tax needs. Our primary goal is to deliver the best possible outcome for your tax situation while offering customer service that sets us apart from other preparers.

This letter outlines the services we offer, our policies and procedures, and what we require from you in order to ensure a smooth and efficient tax preparation process. By signing this letter, you confirm your agreement to our terms and authorize us to proceed with the preparation of your tax return(s).

Our Commitment to You

At Maceyko Tax, we are dedicated to preparing your tax return(s) in a professional manner at a fair price. For new clients, we conduct a thorough interview to understand your personal or business circumstances that may impact your taxes. For returning clients, we review your current information and inquire about any changes that may have occurred since the previous year.

We utilize cutting-edge technology and tax software to prepare your return, ensuring access to the latest tax updates and security features. This allows us to e-file your return, which not only streamlines the filing process but also accelerates your refund. Additionally, we will provide you with an electronic copy of your completed return in PDF format for your records.

Please note that while we will ask for clarification if needed, we will not audit or verify the information you provide. It is your responsibility to ensure that the data you submit is complete and accurate, including any relevant documents and forms necessary for the completion of your tax return.

Privacy and Security

Your privacy is our priority. The information you share with us for tax preparation is sensitive and confidential, and we take all necessary precautions to protect it. We do not disclose any of your personal information to third parties, and we maintain strong safeguards to ensure its security. If you have any concerns or would like more details, please feel free to contact us.

We will retain copies of your submitted documents for the federal statute of limitations period—typically 3 years. After that time, your documents will be securely destroyed. It is your responsibility to retain any records that could be relevant to future tax filings or audits. All original documents will be returned to you after the tax return is completed.

Your Responsibilities

To keep our services efficient and affordable, we ask that you provide all necessary documentation in a timely and organized manner. This includes income statements (such as W-2s and 1099s), receipts for deductions, and any other documents that support the information you have reported.

We understand that life can get busy, but please note that the weeks leading up to tax deadlines are especially hectic for us. To ensure your return is filed on time, we require that all necessary documents be submitted at least **15 days prior to the filing deadline** (March 15th, April 15th, September 15th, or October 15th). If your documents are not submitted by this deadline and you still wish to file on time, a **rush fee of \$100** will be added to your preparation cost.

If you need more time to gather your documents, we can file an extension for you. This will prevent failure-to-file penalties, but any taxes owed will still accrue interest and penalties. If you would like Maceyko Tax to file the extension on your behalf, a fee of **\$30** will apply.

Business Clients

For our business clients, it is essential to keep accurate and detailed records. This includes maintaining logs for expenses such as travel, meals, entertainment, vehicle use, home office, gifts, and promotions. The IRS requires supporting documentation for these expenses, including receipts and clear records of transactions. If records are insufficient, deductions may be denied. You are responsible for maintaining these records and for providing them to us in a timely manner.

Guarantees and Audits

Maceyko Tax guarantees that if you are audited on a return we prepared, we will assist by providing clarification on the amounts and information in your return. Should you require further representation, we are available to work with you at our standard hourly rates.

It is your responsibility to thoroughly review your completed tax return before signing it or authorizing e-filing via Form 8879. You should retain all original documents related to your tax return for a period of **seven years** in case of an audit or review.

Fees and Payment Terms

Our fees are determined based on the complexity of your return, the forms and schedules required, and the time involved in preparing your taxes. We anticipate a slight increase in fees for returning clients due to changes in tax laws and filing requirements. New clients will receive an estimated cost based on their prior year's tax return before work begins.

All fees must be paid in full prior to the e-filing of your return. If payment is not received within **10 days** of the invoice, a **12% annual finance charge** may be applied. Additionally, a **\$35 fee** will be charged for returned checks, and Maceyko Tax reserves the right to recover any collection costs incurred.

For the sake of efficiency, we encourage clients to provide their documentation electronically. **Please note** that if you submit revised figures or documents multiple times, additional fees may apply for the extra time spent on updates.

Acknowledgment

If the terms and conditions outlined above are in alignment with your understanding, please sign and return a copy of this engagement letter. Additionally, by signing, you acknowledge that you have read and understand the separate fee agreement. We look forward to assisting you with your tax preparation and related services throughout the year.

Client Signature

Date