

## **2022 Engagement Letter BRONZE**

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements.

The bronze level of service is only available for simple tax returns. This does not include, Crypto transactions, rental properties, or any business forms. If there are dependents, you are responsible of providing the office with all the relevant information.

In this case, you can drop off, mail in, or upload your current documents to the smart vault. We will prepare your Federal and State income tax returns from information which you will furnish to us. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. We have provided you a questionnaire as a guide in gathering your information, and to assist in keeping fees to a minimum.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all documents, canceled checks, and other data that form the basis of your returns. These may be necessary to prove the accuracy and completeness of the returns if audited. You have the final responsibility for the income tax returns, therefore, you should review them carefully before you sign or authorize the transmittal of them.

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations and or irregularities, should any exist. We will render such accounting or bookkeeping assistance as determined to be necessary for preparation of the income tax returns.

Although the firm may express an opinion about the possible results regarding the outcome of client's matter, the firm cannot guarantee any particular result. You acknowledge that the firm has made no promises about the outcome of any matter and has made no promises about the outcome of any matter.

Your returns may be selected for review by the taxing authorities. In the event of a government tax examination, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred.

You as client for yourself and your heirs, executors, administrators, successors and assigns, hereby waive, discharge, covenant not-to-sue, and release the firm and its employees and principals from any and all liability, causes of action, claims, judgments, costs, expenses (including attorneys' fees and court costs) and demands of any kind or nature, either at law or in equity, which arise or may hereafter arise from services provided by the firm.

You understand and acknowledge that this Agreement discharges the firm from any liability or claim that client or any third-party may have against the firm with respect to any claim, whether filed by client or any third-party that may result from services provided by the firm.

You hereby agree to indemnify, defend and hold the firm harmless from and against any and all claims, demands, losses, suits, judgments, liabilities, costs, damages and expenses, including without limitation, attorneys' fees and court costs at all court levels, arising from or relating to the services provided by the firm. Client further agrees to defend, indemnify and hold the firm harmless from any liability resulting from any claim or cause of action that may be asserted by any third party arising from the services provided by the firm.

You agree that this Agreement is intended to be as broad and inclusive as permitted by the laws of the State of Minnesota, and that this Agreement shall be governed by and interpreted in accordance with the laws of the State of Minnesota, without regard to any conflict of law provisions.

You also agree that the venue for any dispute arising out of this Agreement shall be proper in Hennepin County, Minnesota in the event that any clause or provision of this Agreement is deemed invalid or unenforceable.

The fee for tax preparation services is based upon the specific forms prepared and any additional time or services required. Our forms fee schedule is available upon request. You will be notified when the return is ready to be paid and signed for before being e-filed. After payment and signature, the returns will be e-filed and submitted to the vault for your records.

### **Tax returns are not filed until we received a signed 8879 and the fee has been paid.**

If the foregoing fairly sets forth your understanding, please sign the enclosed copy of this letter in the space indicated and return it to our office. However, if there are other tax returns you expect us to prepare, please inform us by noting so at the end of the return copy of this letter.

We want to express our appreciation for this opportunity to work with you.

**If you are in agreement with the above Engagement, please sign below.**

Taxpayer signature: \_\_\_\_\_

Date: \_\_\_\_\_