



TAX ACCOUNTANTS
BUSINESS CONSULTANTS

Individual Tax Preparation Engagement Letter: Express Service Tax

Year: 2025 (Filing Year 2026)

1. Scope of Engagement

This letter confirms that **Wells, Schluter, Hanson & Co., Inc.** (“we,” “us,” or “the Firm”) will prepare your 2025 Federal and Minnesota Individual Income Tax returns. This engagement is strictly limited to the **Express Service Tier (\$200)**, which is eligible only for individuals meeting the following criteria:

- Income consisting **exclusively** of W-2 wages.
- No dependents claimed.
- One state filing (Minnesota).
- Minnesota Renter’s Credit (Schedule M1RENT), if applicable.
- No “Refund anticipation loans”

2. Scope Re-Classification (Bronze Program)

If, upon review of your documents, it is determined that your return includes any items outside the Express Service scope (including but not limited to: dependents, 1099 income, self-employment, rental property, stock sales, or more than one state return), you will be automatically re-classified into our **Bronze Program (\$525)**. We will notify you of this change before final processing, and you agree to pay the higher fee for the expanded service.

3. Client Responsibility & Indemnification

The quality of our work depends entirely on the information you provide. You represent that the information you are supplying is accurate and complete.

- **Missing Information:** You acknowledge that we will not audit or otherwise verify the data you submit. We are not responsible for any tax, interest, or penalties resulting from your failure to provide all necessary forms (W-2s, CRPs, etc.) or for any omissions or misstatements in the information provided.



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- **Accountability & Indemnity:** You agree to indemnify and hold harmless **Wells, Schluter, Hanson & Co., Inc.** and its individual preparers from any and all claims, liabilities, or costs (including legal fees) arising from our reliance on incomplete, inaccurate, or misleading information provided by you.
- **Documentation:** You are responsible for maintaining the original documentation (including your Certificate of Rent Paid) required by taxing authorities to support your return.

4. Drop-Off/Walk-In Policy

For drop-off services, your return will be prepared in the order it was received. We do not guarantee a specific completion date for the Express Service tier. If additional information is needed, we will contact you via the information provided below. Failure to respond within **48 hours** may result in your return being moved to the end of the processing queue.

5. MN Renter's Credit (Schedule M1RENT)

Effective for the 2025 tax year, the Minnesota Renter's Credit is filed as part of your income tax return. To claim this credit, you **must** provide a valid Certificate of Rent Paid (CRP) issued by your landlord. We cannot "estimate" this credit or file it without a physical or digital copy of the CRP on file.

Acceptance:

By signing below (or by leaving your documents for drop-off), you acknowledge that you have read, understood, and agreed to the terms above.

Client Name (Printed): _____

Client Signature: _____ **Date:** _____



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Individual Tax Preparation: Express Service Instructions

Tax Year: 2025 (Filing Year 2026)

If you have reviewed the qualifications on our service page, understand the terms of the engagement and what is included in the scope of our Express Service, and wish to proceed with working with us, here are your next steps:

1. **Call our office at 952-881-5343 to schedule a drop-off appointment.**
2. Please be sure to prepare and provide the following information and documents to bring to your drop-off appointment.

Your Information:

Legal First Name: _____

Middle Initial: _____

Legal Last Name: _____

Birthday (M/D/YY): ____/____/____

Social Security #: ____-____-____

Occupation: _____

Phone #: (_____) _____-_____

Email: _____

Spouse Information (If applicable):

Legal First Name: _____

Middle Initial: _____

Legal Last Name: _____

Birthday (M/D/YY): ____/____/____

Social Security #: ____-____-____

Occupation: _____

Phone #: (_____) _____-_____

Email: _____

Home/Mailing Address:

Address: _____

Unit/Apartment: _____

City: _____

Zip: _____

**PLEASE BE SURE TO FILL THIS
FORM AND SIGN THE
ATTACHED ENGAGEMENT!**

Tax Documents (all applicable):

- Prior Year Tax Return
- W2(s)
- 1099-INT/1099-DIV ONLY!
- CRP or
- Property Tax *(Note: M1PR filing is an additional fee)*
- Mortgage Interest form 1098

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3. At your scheduled drop-off time you will submit all necessary forms and information, including your signed engagement. An accountant will then review your document to ensure qualification of the express service, collect payment (cash or card) and provide you with an estimated time of completion for your return.

If you have any questions, **please call 952-881-5343**. Thank you!