

# Square 1 Accounting LLC

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January 1, 2024

**Subject:** Engagement Letter for the Preparation of Your 2023 Taxes

Thank you for choosing Square 1 Accounting LLC to assist you with your 2023 taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your 2023 federal and state income tax returns. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. An Organizer is enclosed to help you collect the data required for your return. The Organizer will help you avoid overlooking important information. By using it, you will contribute to the efficient preparation of your returns.

We offer accounting and bookkeeping services, if needed. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. I am required to state that the law imposes penalties when taxpayers underestimate tax liability.

Our fee is based on the specific tax forms completed for your return. Invoices are due and payable upon completion. All accounts not paid within thirty (30) days are subject to interest charges to the extent permitted by state law.

Your completed tax return will be submitted once payment is received for services. You will also receive a copy of your return with password protection. Store your records, along with all supporting documents, in a secure location. We retain copies of your records and our work papers from your engagement for up to seven years, after which these documents will be destroyed.

Review all tax-return documents carefully before signing them. Our engagement to prepare your 2023 tax returns will conclude with the delivery of the completed returns to you, or with e-filed returns, with your signature and our subsequent submission of your tax return.

To affirm that this letter correctly summarizes your understanding of the arrangements, sign the enclosed copy of this letter in the space indicated and return it via the email it was sent to you from.

Thank you for the opportunity to be of service.

Sincerely,

Jasmine Johnson

**Square 1 Accounting LLC**

(Both spouses must sign for preparation of joint returns.)

**Accepted By:**

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**Name (s)**

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**Address**

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**Phone Number**

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**Taxpayer Signature**

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**Spouse Signature**

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**Date**