



## Individual Income Tax Return Annual Engagement Letter

Client Name(s): \_\_\_\_\_

We would like to express our gratitude for choosing JB Bookkeeping & Taxes/JB Bookkeeping Cardinal & Larson Taxes, LLC to handle your tax affairs. This letter serves to outline the terms of our engagement and the scope of services we will provide.

We will prepare your federal and state income tax returns for the year **2024** based on the information you provide. While we may request clarification on certain items, please note that we will not conduct an audit or verify the accuracy of the data submitted. Utilizing our Organizer tool can help ensure that you capture all necessary information, facilitating an efficient tax return preparation process and helping to keep our service fees low.

It is your responsibility to supply all information needed for the accurate and complete preparation of your tax returns. You should maintain all supporting documentation, such as receipts, canceled checks, and any other data relevant to your reported income and deductions. These documents may be required to validate the completeness and accuracy of your returns if questioned by tax authorities. You are ultimately accountable for the returns, so we encourage you to review them thoroughly before signing.

Our services will not include uncovering fraud or irregularities. Any accounting or analysis work performed will solely be for the purpose of preparing your income tax returns.

In situations where tax law is ambiguous, we will exercise our professional judgment to resolve any issues. Unless instructed otherwise, we will operate under the "realistic possibility of success" standard to favorably resolve such discrepancies whenever feasible.

Please note that tax law imposes penalties for underreporting tax liability. If you have concerns about these penalties, do not hesitate to reach out to us.

Your tax returns may be subject to an audit by a taxing authority, and any suggested adjustments can be appealed. Should you undergo a tax examination, please ensure that you retain all records related to the information provided to our office.

**To ensure the timely completion of your return by April 15, 2025, we must receive all necessary information by March 25, 2025. If we receive your information after**

**April 1, 2025, and you intend to file by April 15 (without an extension), an expedited fee will apply.** We do not file tax extensions unless specifically requested for an additional fee.

Please remember that tax extensions only provide extra time for filing the return; payment is still due by the original deadline. If any taxes are owed, we will strive to estimate those amounts accurately at the time the extension is filed, but penalties and interest may still be applicable.

Our fees for preparing your tax returns will be determined based on the tax forms involved and the time required, charged at our standard billing rates plus any out-of-pocket expenses. Payment is due at the time of service or pick-up, and tax returns will not be submitted until payment has been received. ***Please note that a 3% service charge will apply for payments made by credit or debit card. To avoid this fee, we gladly accept cash, checks, Zelle, and Venmo.*** Should you receive notices from the IRS or FTB related to matters outside the scope of our tax preparation or resulting from a failure to submit documents, we will charge a fee of \$95.00 per hour to address these notices.

We will retain copies of your submitted records and our work papers for three years, after which they will be securely disposed of. All the original documents you provide will be returned to you at the conclusion of this engagement. We recommend that you store your original records securely for potential future use, as they may be needed for inquiries from government or regulatory agencies. Please be advised that we do not serve as custodians for your records.

We appreciate the opportunity to assist you. Kindly date and sign this letter to confirm your agreement to the terms outlined and to acknowledge your responsibilities. We will commence our services once we receive the signed engagement letter.

Sincerely,

JB Bookkeeping Cardinal & Larson Taxes, LLC /JB Bookkeeping & Taxes  
Main Office- 901 Sneath Lane #113 San Bruno, CA 94066

(At least one spouse must sign this engagement for the preparation of a joint return)

Accepted By:

Taxpayer:

\_\_\_\_\_ Date \_\_\_\_\_  
*Signature*

Spouse:

\_\_\_\_\_ Date: \_\_\_\_\_  
*Signature*