TAXESBYME.TJR
PO BOX 587, OAK GROVE, MO 64075
816-690-7997 taxesbymetjr@gmail.com

General Engagement Letter for Individual Tax Return Preparation

This letter is to inform you, the taxpayer, of the services we will provide you, and the responsibility you have for preparation of your tax return.

Tax Return Preparation Services

• We will prepare your 2026 Form 1040, U.S. Individual Income Tax Return, and applicable state tax return(s) based on information you provide. Services for preparation of your returns do not include auditing or verification of information provided by you.

• This engagement does not include any audit or examination of your books or records. In the event your return is audited, you will be responsible for verifying the items reported.

• Assisting you with your compliance with the Corporate Transparency Act, including beneficial ownership information reporting, is not within the scope of this engagement.

• The tax return preparation fee does not include bookkeeping. Additional fees apply for these services.

• Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities.

• Preparation fees do cover limited assistance and consultation during the year.

• The engagement to prepare your 2026 tax returns terminates upon delivery of your completed returns and original documents to you. Please store your supporting documents and your tax returns in a secure place for at least seven years. You may be assessed a fee if you request a duplicate copy in the future.

Taxpayer Responsibilities

• You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.

• You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.

• You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.

• You must review the returns carefully before signing to make sure the information is correct.

• Fees must be paid before your tax returns are delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer may be required for preparation of returns.

• You consent for the tax preparers to receive, secure and convey electronically submitted information in the preparation of your tax return. Methods include: email, IM, texting, e-signature, faxing to the company and company employee's electronic equipment.

Taxpayer: _____ **Spouse:** _____ **Date:** _____

Bank Verified: _____

Privacy Policy

The nature of our work requires us to collect certain nonpublic personal information about you from various sources. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to any third party without your express written permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access. Please contact us with any questions regarding our privacy policy.