



Ohio Tax Lady

Tax Preparation Engagement Letter

What is this letter?

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. The IRS imposes penalties on taxpayers and tax return preparers for failure to observe due care in preparing income tax returns. In order to ensure an understanding of our mutual responsibilities, we ask all clients to confirm the following arrangements followed by signing a Due Diligence.

Ohio Tax Lady Responsibilities

We will prepare your 20_____ U.S. Individual / Business Income Tax Return with all necessary supporting Forms and Schedules from the information provided by you. We may ask for clarification of some items, but it is not our responsibility to audit or otherwise verify the data you submit. We have provided a Client Data Form to gather information. Using the Client Data Form will help you avoid overlooking important information and contribute to efficient preparation of your returns. This helps keep the cost of our services as low as possible. Failure to use or update your Client Data Form and failure to provide us with all your tax information may cause delays which could cost you not only time in obtaining your refund but money in additional preparation cost. We are not Attorneys and cannot represent you in court. We can assist your Attorney.

Taxpayers Responsibilities

It is your responsibility to provide all the information required for the preparation of a complete and accurate income tax return. You represent that the information you are supplying to us is accurate and complete to the best of your knowledge and that any expenses claimed, such as but not limited to, for meals, entertainment, travel, business gifts, dues and membership, vehicle usage, and/or charitable contributions are supported by records as required by law and that you have disclosed all known tax liabilities. **You are confirming that you will not withhold any information that may affect your tax situation or tax filing. If you are unsure about an issue, we need to discuss it and may need to wait before you sign your income tax return.**

IRS guidelines require us to e-file **all** income tax returns we prepare. Unless you feel e-filing your income tax return will do you *undue hardship*, your income tax return will be filed electronically with the IRS. Prior to you signing the Form 8879, you will be able to review a complete copy of your income tax return. Furthermore, we will email you a copy or back up onto a USB, you provide, of your completed tax return. For an additional \$5 fee we can print your return which you will be responsible to pick up at a later time (usually within five [5] business days). You may elect to have your copy mailed to you for an additional \$10.

The law also imposes penalties when taxpayers understate their tax liability. You have the final responsibility for your income tax return and, therefore, you should review your return carefully. We will use professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible. We have created a policy and procedure of peer review for maintenance of quality control in our office. As part of this program, your return may be reviewed by other tax preparers in our office under strict rules of confidentiality. We will not disclose any of your privileged information, unless required by law, without written instructions from you.

In the event you receive a letter from the IRS, State or Municipality on an income tax return we prepared, we will assist you in resolving the issue with the Tax Department. You are responsible for tax liabilities however; if we made an error we will pay interest and penalties. If the error is from a mistake we made we do not charge for audit assistance.

Please sign below that you understand and except this engagement

Taxpayer Sign: _____ Spouse Sign: _____

Consent to Use Tax Return Information
Section 7216 Disclosure



Why you are getting this form?

Federal law requires this consent form be provided to you to inform you what we, Tigre Tax Lady Corp d/b/a Ohio Tax Lady, will do with your information.

You are not required by law to complete this form. However, because our ability to disclose your tax return information to another tax return preparer/staff affects the service that we provide to you and its cost, we may decline to provide you with service or change the terms of service that we provide to you if you do not sign this form.

What will Ohio Tax Lady do with my personal information?

We are going to prepare your tax return as requested. Your information is confidential and will be kept securely in our office. We will NEVER compromise, give or sell your information.

So, what do I need to know and need to do?

Unless authorized by you, by law, we cannot disclose, without your consent, your tax return information to third parties for purposes other than the preparation and filing of your tax return and, in certain limited circumstances, for purposes involving tax return preparation. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You have to give us permission to share your information within the office. We are a team working together to help you. We answer your questions when you call, we give you your copies, we process the return. Not just your tax-preparer helps you.

Also, our third party software used is DRAKE. They will have your information in their system. The IRS recommends Drake as one of the top 10 professional tax software providers.

What else do I need to know?

Because we are not just a tax office and we offer other services the law requires you to give us permission to help you with these other services. If we have to open your tax return to answer questions regarding these services or if you are a customer of these other services and we need to open your tax file to help you then we *MUST* have your initials and signature below. Check the box if you want more information about this service.

Another division of the Company to assist with Bookkeeping Services.

Another division of the Company to assist with Financial Services.

An Employee of the company to assist with Affordable Health Care / Medicare Supplements.

By signing this form you authorize the disclosure of your tax return information to Ohio Tax Lady staff & DRAKE Software. If you agree to the disclosure of your tax return information, your consent is valid for one year.

I/We Authorize Ohio Tax Lady and my **Tax-preparer** to disclose my/our 20_____ tax return information to the above mentioned to the allowable / authorized person(s) for such purpose noted above for one year or period provided

I agree, _____ (Taxpayer signature) _____ date

I agree, _____ (Spouse Signature) _____ date