



**INCOME TAX EXPRESS NM**

**INDIVIDUAL / BUSINESS TAX RETURN ENGAGEMENT LETTER**

CLIENT NAME: \_\_\_\_\_

STREET ADDRESS: \_\_\_\_\_

CITY, STATE ZIP: \_\_\_\_\_

Thank you for selecting Income Tax Express NM to assist you with your tax affairs. This letter confirms the terms of our engagement with you and the nature and extent of services we will provide.

We will prepare your \_\_\_\_\_ federal and state income tax returns you request using information you provide to us. We may ask for clarification of some items, but we will not audit or otherwise verify the data you submit. We've enclosed an "Organizer" to help you gather the information required for a complete return. If you use the Organizer, it will help you avoid overlooking important information and contribute to efficient preparation of your returns. That helps keep the cost of our services as low as possible.

It is your responsibility to provide information required for preparation of complete and accurate returns. You should keep all documents, canceled checks and other data that support your reported income and deductions. They may be necessary to prove accuracy and completeness of the returns to a taxing authority. You are responsible for the returns, so you should review them carefully before you sign them.

Our work will not include any procedures to discover defalcations or other irregularities. The only accounting or analysis work we will do is that which is necessary for preparation of your income tax returns. The law also imposes penalties when taxpayers understate their tax liability. If you have concerns about such penalties, please call us.

Our fee for preparation of your tax returns will be based on the Forms and Schedules prepared plus out-of-pocket expenses. All invoices are due and payable upon presentation. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (30) days.

We will retain copies of records you supplied to us along with our work papers for your engagement for a period of seven years. After seven years, our work papers and engagement files will be destroyed. All of your original records will be returned to you at the end of this engagement. You should keep the original records in secure storage.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign this copy in the space indicated and return it to us.

(Both Taxpayer and Spouse must sign for preparation of joint returns)

Accepted By: (Taxpayer) \_\_\_\_\_ Date: \_\_\_\_\_

(Spouse) \_\_\_\_\_ Date: \_\_\_\_\_