

# ACCOUNTAX

of OREGON INC.

We Do Taxes!

8050 SW Pfaffle St., Suite, 110 • Tigard, OR 97223-6758

Phone 503-619-1040 • Fax 503-619-1045 • Business Lic #B14044

www.accounttaxoforegon.com • adminstaff@accounttaxoforegon.com

Name(s) \_\_\_\_\_

Business \_\_\_\_\_

## Engagement Letter

We will prepare your Federal, State(s) and Local income tax returns as necessary. We depend on you to respond and provide timely information needed to prepare complete, accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. We will perform accounting services only as needed to prepare your tax returns. 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 clients to clarify some of the information submitted. We will, of course, inform you of any material errors, fraud, or other illegal acts we discover.

To protect your confidentiality, if you would like us to share your return information with a third party, we need your written instructions using a signed Consent to Disclose form, IRS Power of Attorney (for tax purposes only), and/or Oregon Tax Information Authorization. You may receive a verification letter from the agencies if we access your online information to complete or verify status of your return.

Should we encounter instances of unclear tax law, or potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We may be able to resolve in your favor if it is ordinary, necessary, and reasonable for your situation

**We do not automatically call or remind you! Extensions allow for extra time to file, not to pay. Penalties and interest are the sole responsibility of the taxpayer.**

We use a team approach to prepare your taxes. After tax preparation, returns are in final stages of preparation including a second review, then document assembly. We will contact you to schedule an appointment for presentation either in person, Zoom, or by phone to discuss final tax results. Payment for tax preparation is due prior to releasing the tax return.

From intake to completion, our tax preparation bill is based on the time necessary to prepare each tax form, gather information, and administrative processes required to prepare and present your tax return. Payment for our services performed are due and payable upon completion of tax preparation. We will contact you to finalize your return, please promptly respond. We will not e-file or provide a copy of your return until the bill is paid in full.

If a tax agency sends you a letter of inquiry for taxes that we prepared, it is time sensitive. Call our Admin right away to arrange delivery of the document so we can respond to it. For agency questions, our first response to them is free, thereafter, time charges of \$135 an hour accrue. This does not include amendment fees.

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Professional and respectful conduct and communication is expected at all times. If we are unable to complete the tax return due to client unresponsiveness, misbehavior, disrespectful conduct to staff or early termination for any reason, we will arrange to return your original documents and provide you with a bill for services rendered to date. **Payment in full is due for work completed up to the day of early termination.**

The law imposes penalties when taxpayers underestimate their tax liability. Please call us if you have concerns about such penalties. AccountTax of Oregon, Inc. will not be responsible for any additional tax, penalties or interest imposed due to client omissions, errors, or lateness. AccountTax of Oregon will reimburse any penalties imposed due to a calculation error on our part up to the time of the first letter from the taxing authority.

Client is responsible for making payments on any tax and interest balances due. Paper tax documents will be returned at presentation. Retain a minimum of 4 years.

After payment for our services, our Engagement will conclude with delivery of the completed tax return(s) presented to you for signatures. Review your tax return and ask questions before signing it. Upon receipt of your signature, we will e-file the tax return(s). All disagreements will be settled through arbitration and payment subject to collection fees. Any refund of fees will be in the form of a credit to be applied to future tax preparation fees.

If an agency calls for an audit, it is the client responsibility to provide proof of income and deductions documents. Assistance will to be billed at the current consultation rate per hour. Documents relating to a business asset must be kept for the life of the asset. Securely store your tax documents, along with copies of all supporting, receipts and canceled checks, etc., as these items may later be needed to prove accuracy and completeness of a return.

Your signature affirms your understanding of the arrangements for this work. If married and filing jointly, signature of representative spouse implies affirmation by the other.

We appreciate your confidence in us and we look forward to working with you.

Your AccountTax of Oregon, Inc. Team

Accepted By:

\_\_\_\_\_  
Taxpayer Name Printed

\_\_\_\_\_  
Taxpayer Signature

\_\_\_\_\_  
Date