ENGAGEMENT LETTER

TO: LEMMON NOTARY & TAX SERVICES

I have engaged you to prepare my income tax returns, including federal, state, and local as applicable for the current year ending December 31, except as marked. In that respect, I state that, to the best of my knowledge and belief:

1. I understand that it is my responsibility to provide all the information necessary to complete the returns. I will retain for three years all the documents, receipts, cancelled checks and other records required to substantiate the items of income and expense claimed on my returns.
2. I understand that you will not audit or otherwise verify any information, and that you may require clarification or additional information.
3. I have provided true, correct, and complete information regarding my income as listed on the attached Forms W-2, 1099 and/or attached written summaries. I have included all income received during the year, including unemployment compensation, sales of property, withdrawals from investments, jury duty pay, lottery winnings, etc.
4. I have provided true, correct, and complete information regarding amounts I have provided to you to claim as tax deductions, and have maintained written documentation supporting all amounts, including logbooks and receipts. I have fully documented all business travel and entertainment deductions and have maintained logbooks to support the business use percentage of automobiles, cellular phones, and other business assets.
5. I have no foreign financial accounts, trusts, or businesses, except as indicated in the information I have provided to you.
6. I have not employed any household help that would be subject to payroll taxes except as reported.
7. I do not wish to designate a portion of my taxes to support the Presidential Election Campaign Fund, unless I have specifically stated so in the attached documents.
8. I have provided you with an accurate total of out-of-state purchases made during the year(s) in which I paid no sales tax, including purchases from catalogs, by telephone, and via the internet.
9. I will contact you immediately if I receive any letters from the IRS or other taxing authorities concerning these tax returns.
10. I understand that penalties may be imposed on returns that are late, underpaid, or incorrect.
11. I will contact you immediately if I discover additional information that will change my tax returns. I understand additional charges may apply.
12. I understand that if a question arises regarding the interpretation of tax law, and a conflict exists between the tax authorities' interpretation of the law and other supportable positions, you will use your professional judgment in resolving the issues. I understand that you are not responsible for disallowed deductions, or the inclusion of additional unreported income or any resulting taxes, penalties or interest.
13. I understand that your invoice will be due and payable upon completion of these returns, and that additional services will not be performed until the invoice for these services is paid in full. I understand that your invoice will be based upon your standard billing rates posted in your office. A Finance charge of 5% will be added for all invoices 30 days from the original due date. A deposit may be requested.
14. I understand that I will be charged an additional fee if you assist me or represent me in a tax examination or inquiry including responding to letters from taxing authorities. I understand that, in the event of preparer error, I am responsible for any additional tax that may be due.

Privacy Policy

It has always been the policy of Lemmon Notary & Tax Services to keep all information that we collect from you confidential from all sources. We restrict access to all nonpublic personal information about you to members of our firm who need to know that information to provide services to you. We do collect nonpublic personal information about you from the following sources:

1. Information we receive from you on tax preparation organizer, worksheets, Federal and State tax reporting forms, and from other documents we use in tax preparation or other financial and related services.
2. Information about your transactions with us, our affiliates, and others.
3. Information we may receive from outside agencies such as banks and brokerage houses.

We do not disclose any nonpublic personal information about our clients or former clients, except as permitted, required, or approved by you in writing as listed below:

1. Requirements to comply with federal, state, or local law.
2. Requirements to comply with national, state, or local licensing rules.
3. Requirements to disclose information in response to legal subpoenas.
4. Items you permit or request us to disclose, as authorized by you in writing.
5. Information that you authorize us to disclose by signing this engagement letter to electronically file your tax return, when applicable.
6. Information that you authorize us to disclose by signing this engagement letter, which discloses that you are our client, without disclosure of financial or other personal information.

I am solely responsible for the accuracy of the data that I provide. I understand that my return will be prepared based on the information I provide; and I will be charged an additional fee if changes must be made to my return. I understand all forms must be signed and payment arrangements made before my tax returns are e-filed. I will keep my copy of my tax return in a safe place and understand a fee of $10.00 (includes tracking) will be charged for a duplicate copy. **NO PIN#'s or AGI's** will be given out without the paid fee. I will not send any attachments via email; I understand they will not be opened and that any and all forms must be uploaded to the Secure Portal and must be in PDF format only.

I authorize Lemmon Notary & Tax Services, to use the following email address for the purpose of sending digital copies to the secure portal only:

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Accepted by:

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Taxpayer Signature ____

Name (print) ____

Spouse Signature ____

Name (print) ____

Other Services to be Performed (returns for children, financial planning, insurance review, investment services, etc.):

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