



Over 30 years experience in Accounting, Business & Individual Income Taxes

## LETTER OF ENGAGEMENT

We ("Fast Tax Service") are committed to providing the highest quality of tax preparation and excellent service. This engagement letter expresses the terms and conditions under which Fast Tax Service will provide tax services for \_\_\_\_\_ (Taxpayer) and \_\_\_\_\_ (Spouse if applicable), collectively as "the Client(s)". This letter outlines the responsibilities for both parties.

We will prepare the Client(s) federal income tax return (and any state returns the Client(s) may require) from information the Client(s) provide. In preparing the Client(s) return(s), we will not audit or verify the data that the Client(s) submit (although we may ask for clarification). We will use our judgement in resolving questions where the tax law is unclear or where there may be different interpretations of the law. We will resolve such questions in the Client(s) favor whenever possible.

To protect our client's information, **we will not accept the exchange of data through email or text. Additionally, we are not liable for any breach of information sent to us through unsecured line of communication.** We can, however, provide a tax organizer through a secure portal or in person, to help gather the necessary information. The Client(s) will provide us with all the information required to prepare the return(s), representing that the income and expense items being claimed are substantiated by proper records and receipts. The Client(s) are ultimately responsible for the accuracy of their return(s) and should review all returns carefully before signing. If the tax return isn't electronically filed, mailing it is the Client(s) responsibility.

The income tax returns, of course, are subject to review by the taxing authorities. If the Client(s) receive a letter from the Internal Revenue Service ("IRS") or the return is selected for audit, the Client(s) can call the IRS or we can assist in trying to resolve the issue. Such consultation **is free for the first 15 minutes; however, any additional time spent is charged at \$50 for each 30-minute increment.**

If there is an error on the return which results from incorrect information supplied by the Client(s), we can assist in amending the return for an additional fee. The Client(s) are responsible for the payment of any additional taxes, which would have been properly due on the original return(s), and any interest and penalties charged by the IRS. If Fast Tax Service made an error, other than an error caused by incorrect information the Client(s) supplied, there will be no additional fee and we will reimburse the Client(s) for penalties incurred. We will not pay the taxes owed or interest on the additional tax due. It is your responsibility to inform us of any **foreign assets or foreign transactions.**

**Fees:** Tax Preparation fees are dependent on the forms generated by the software. Other tax returns i.e. 1120, 1041 and 1065 will be billed separately. **A deposit of \$150 is assessed for tax preparation services done REMOTELY of which \$50 is nonrefundable,** but the full amount will be applied towards your tax preparation fees. A full payment is required before we can either electronically file the return(s) or release the paper return to the Client(s). Any additional copies requested will require an additional fee of **\$20.**

**Extension requests:** We do not automatically file extensions. Please contact us prior to April 1<sup>st</sup> if the Client(s) would like to request an extension of time to file the return(s). We assess **\$50 for each extension requested.** This may be necessary if we do not have all of the Client(s) documents within 10 days prior to the due date. **Please note that filing an extension, only extends the Client(s) filing deadline. It does not extend the payment due date; therefore, the Client(s) are still responsible for any late payment penalties and interest if tax liabilities are not paid by the original deadline.**

We will not start processing your return unless this letter is signed. A copy will be provided for the Client(s)r records.

**Privacy Statement:** We maintain a file of tax returns for **3 years,** which we have prepared and/or electronically filed. We do not share the Client(s) information with anyone else, except as required by law, without the Client(s)r written consent.

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse Signature

\_\_\_\_\_  
Date



Over 30 years experience in Accounting, Business & Individual Income Taxes

## PRIVACY POLICY

FAST TAX SERVICE, like all providers of insurance, investment and personal income tax preparation services, is required by law to inform our clients of our policies regarding privacy and client information. We are always committed to protecting your personal information and right to privacy.

### Types of Nonpublic Personal Information We Collect

We collect Nonpublic Personal Information (NPI) about you and your dependents (if applicable) that are provided to us by you or obtained with your authorization. We collect this information to service your accounts and respond to your requests.

### Parties to Whom We Disclose Information

For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice, without your written consent or permitted by law. Permitted disclosures include, for instance, providing information to our employees, and in limited situations, to unrelated third parties who need that information to assist us in providing services to you. We may refer this information to an affiliated financial or tax professional where such referral is thought to be in your interest. Please advise us if you would require us to hold all Nonpublic Personal Information (NPI), including basic directory information, confidential under any circumstance. We restrict access to nonpublic personal information (NPI) to those professionals necessary to helping you achieve your goals and we maintain physical, electronic and procedural safeguards that comply with federal standards to guard your non-public information.

### How does FAST TAX SERVICE Collect Data and How Long Will It Be Stored?

Whenever we collect Nonpublic Personal Information (NPI) personal data in our office via initial personal interview or telephone this policy informs you about the extent to which we collect. We will not collect Nonpublic Personal Information (NPI) without explicit consent via signed privacy form. All personal data will normally be stored until it has fulfilled the purpose for which it was collected or as regulated by the IRS, normally three years. However, if a prospective client wants his/her personal data removed from our databases, we will delete that data upon written request in accordance with applicable laws.

### Policies Regarding Our Website Systems

FAST TAX SERVICE We may gather and analyze Nonpublic Personal Information (NPI) data regarding the use of our websites including domain names, number of hits, pages visited, length of use sessions etc., to evaluate the usefulness of our sites. These numbers are used for statistical purposes only and are not shared with any organizations outside of FAST TAX SERVICE. The NPI gathered may be transferred to areas within FAST TAX SERVICE and will not be shared with any organization outside of FAST TAX SERVICE, except were permitted by law. It will only be used according to the purpose described on the respective page where the data is collected. We will not share the Nonpublic Personal Information (NPI).

### Keeping up to date with our Privacy Policy

As required by law, FAST TAX SERVICE will provide notice to our policy when changes are made and as long as you maintain an ongoing relationship with us. To receive a copy of the most up to date Privacy Policy, call us at (815) 385-8884. We may make changes to this policy at any time and will inform you of changes as required by law.

### Confidentiality and Security

Our employees are required to follow procedures with respect to maintaining the confidentiality of our clients' NPI

If at any time, you are not satisfied with our procedures to protect your privacy, or if you have questions regarding the collecting and/or use of your personal data, please contact us. You may also contact the Treasury Inspector General for Tax Administration by telephone at (800) 366-4484. We will use all reasonable efforts to promptly address your concern. Your privacy, our professional ethics and the ability to provide you with quality insurance, investment and tax preparation services are important to us.

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date