Agreement as to Nature and Scope of Tax Services Engagement

This engagement letter is used to confirm the terms and arrangements for our tax services. *Please read it carefully before you sign it*. This letter will continue to apply to the preparation of your returns currently, and in subsequent years, unless amended or terminated in writing by either of us.

We will prepare your federal and applicable state income tax returns from information you will furnish us, and you are agreeing to provide us with any and all pertinent information concerning any taxable income and deductions that may exist. We will not audit the data you submit, although we may ask you to clarify some of it, and we may ask you to certify that you have adequate substantiation for deductions claimed. It is important that you understand that both the Federal and State taxing authorities, by regulation, require that you maintain and retain information substantiating all items reported on your returns. Requirements for documentation are especially important for travel, entertainment, auto, donations, and business expenses.

As a matter of law, the responsibility for the tax returns is *yours*, so be sure the returns are consistent with the facts and the data you furnished before you sign them. We will provide you with a Tax Organizer to help report your tax information to our office. Please take special care in completing the tax organizer. If you discover an error in the returns, do not sign them; give them back to us and we will change them. We will resolve any questions involving application of tax rules in your favor if there is reasonable justification.

Fees for preparation of your returns will be billed at our standard rates, based on the schedules and forms required to report your taxable financial activities, the amount of time spent, and the complexity of the items involved. If you request, we will assist you in compiling your tax information. Such assistance is a separate service that will require additional time on our part, and additional expense to you.

We will consult with you and complete your returns as soon as possible. Most returns will be done by April 15. Some returns will be extended, but you will be notified if this is necessary. *Our invoices are earned and payable prior to you receiving your completed returns*. Unpaid balances over 30 days beyond invoice date are subject to additional monthly delinquency charges of 1.50% (18% per year) of the unpaid balance, in addition to any collection costs we may incur.

Your returns are, of course, subject to review by the various taxing authorities. Any items resolved against you by the appropriate examining officer are subject to certain rights of appeal. You will be responsible for the taxes, penalty and interest on any items resolved against you that we properly reported based on the information you provided. In the event of an examination, we will be available to assist you. Invoicing for such assistance will be at our standard hourly rates for such level of service as may be required.

If the above fairly sets forth your understanding, please sign, date and return this engagement letter below where indicated. You also acknowledge that you have read and agree to our privacy policy. We are pleased to have you as a client, and look forward to a long and mutually satisfying relationship.

Respectfully yours,

Mike Habib, EA

Mike Habib, EA

I agree & approve: X______________________________________ Date: ____________

I agree & approve: X______________________________________ Date: ____________

Mike Habib, EA 13215 Penn Street, Suite 329, Whittier, CA 90602 Tel: 562-204-6700 Fax: 562-265-8622

Privacy Policy

Enrolled Agents (EAs), like all providers of personal financial services, are now required by law to inform their clients of their policies regarding privacy of client information. EAs have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. Therefore, we have always protected your right to privacy.

Types of Nonpublic Personal Information We Collect

We collect nonpublic personal information about you that is provided to us by you or obtained by us with your authorization.

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 except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, affiliated independent tax preparers, affiliated independent tax representatives and in certain situations, to unrelated third parties who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared.

Protecting the Confidentiality and Security of Current and Former Clients' Information

We may retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

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Please call if you have any questions, because your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

Printed Name of Taxpayer: ____

Taxpayer Signature: _____________________________ Date: _____________

Printed Name of Joint Taxpayer: ____

Joint Taxpayer Signature: ________________________ Date: _____________

BASIC FEE SCHEDULE

(AS OF 04/26/2019)	**From/Minimum**
W-2 / 1099 (each)	$20.00
Form 1040EZ	$100.00
Form 1040A	$150.00
Form 1040	$150.00
Schedule A	$80.00
Schedule A supporting worksheets	$20.00
Schedule B	$80.00
Schedule B supporting worksheets	$20.00
Schedule C-EZ	$100.00
Schedule C	$250.00
Schedule C supporting worksheets	$20.00
Schedule D	$80.00
Schedule D-1	$50.00/minimum
Schedule E	$80.00
Schedule E page 2	$40.00
Schedule EIC	$50.00
EIC Worksheet	$50.00
Child Tax Credit worksheet	$50.00
Schedule SE	$40.00
Form 2106	$50.00
Form 2441	$50.00
Form 3903	$50.00
Form 4562	$50.00
Form 4797	$80.00 minimum
Form 8863	$40.00
Form 8867	$40.00
STATE FORMS AND FEES	
Form 540	$100.00
Form 540NR	$100.00
Form 150PY	$50.00
Foreign states	$80.00
CA Schedule A	$50.00
CA Credits	$20.00 each
Form 322	$40.00
Form 323	$40.00
MISCELLANEOUS	
Form 1041	$800 minimum
Form 1065	$800 minimum
Form 990/1120/1120S	$800 minimum/Average $1,200-$3,000

Basic fee is $200.00. All fees are subject to change without notice. Additional forms and charge may apply. Our basic time charge is $90.00 per hour. Electronic filing fees vary.
Fee would differ based on complexity of tax return.