**CLIENT ENGAGEMENT LETTER**

Dear Client: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Thank you for choosing ***Nessas Tax Service*** to complete your tax return this year. I look forward to working with you. In the letter below, you will find the terms, nature, and extent of the services to be provided, and you will be asked to confirm your understanding and of any mutual responsibilities. Please **read** the letter below and **sign**, so I can begin working on your return.

***IRS has designated January 23, 2023, as the beginning of the nation's 2023 tax season when the agency will begin accepting and processing 2022 tax year returns.***

**Important Deadlines**

March 31st – April 15th – To submit your Tax return information to *Nessas Tax Service*

**Key Filing Season Dates**

There are several important dates taxpayers should keep in mind for this year's filing season:

* *January 13*: IRS Free File opens
* *January 17*: Due date for tax year 2022 fourth quarter estimated tax payment.
* *January 23*: IRS begins 2023 tax season and starts accepting and processing individual 2022 tax returns.
* *January 27*: Earned Income Tax Credit Awareness Day to raise awareness of valuable tax credits available to many people – including the option to use prior-year income to qualify.
* *April 18*: National due date to file a 2022 tax return or request an extension and pay tax owed due to the Emancipation Day holiday in Washington, D.C.
* *October 16*: Due date to file for those requesting an extension on their 2022 tax returns.

If information is received after the last extension filing date or October 16th you may be subject to an additional fee.

Your federal and state income tax returns will be prepared with the information you provide. You will provide *Nessas Tax Service* with complete and accurate information up front to *Nessas Tax Service* will keep the information you provide confidential. Services will be provided only as needed to prepare your tax returns. No audit or verification of the submitted data will occur. However, *Nessas Tax Service* will follow up to request clarification and/or documentation of information as needed. You will also be notified should any material errors, fraud, or other illegal acts be discovered.

You are responsible for reporting any foreign activities upon signature. By signing this letter, you acknowledge that you will inform me of any foreign sources of income or if you have signatory authority over any foreign financial accounts. If you are still determining whether income/ accounts are foreign, please disclose this regardless so I can review it. Failure to report these types of activities will result in severe penalties from the IRS.

You will be responsible for providing all necessary documentation required by law to support your data. This includes gifts, and for Self- Employed individuals, travel, vehicle use, meals, charitable contributions, and so forth. If you need clarification on what documentation is required at any time, please reach out to discuss that with me further. Professional judgement will be used to resolve issues when tax law is unclear or when there is conflict among authorities. But ultimately, you, the taxpayer, have the final responsibility for your tax return (s). Therefore, it is imperative that you carefully review all documents before signing and filing them.

*Nessas Tax Service* may also provide a **Client Questionnaire** for you to complete upfront, which will ensure I collect your most recent up-to-date information. Completion of this form is optional but can help remind you of what items are needed. Nonetheless, upon signature, please provide originals/ copies of originals for all government tax documents such as, W2’s, 1099s, 1098s, and property tax statements. All records will be returned to you after I’ve finished serving you. I recommend you store them securely, as well as supporting documents, in case they are needed later in the tax preparation process. Nessas Tax Service will retain copies of all records, paperwork, and notes for five (5) years as required by Federal Tax laws, after which these documents will be securely disposed of/ destroyed.

Please remember that if I am preparing a joint return for you and your spouse, tax returns and copies of all supporting documents will be made available to both spouses without the other spouse’s consent or notification.

The filing deadline this year for tax returns is April 18th. All information must be received for filing by me no later than March 30th, for extension April 14th or October 1- the 15th to meet the two filing deadlines. If additional time to file is needed, your provided information will be used to file an extension. Pleas remember that to prepare a valid and accurate extension, I will need as much information as possible. You will also need to expressly approve filing an extension before this can be done on your behalf. As a reminder Extensions only provide you additional time to file, not to pay. Taxes paid after April 18th will result in fees and interest.

Tax preparation fees will be charged based on the complexity of work and will be quoted, or (See the Price List available on the Website) before the start of any work. Should any complications arise as your return(s) is being prepared, fees may be adjusted accordingly. Invoices/ PayPal payments are due and payable after receiving a notification that your return(s) were accepted, normally the next day. You will receive an email/phone call letting you know the return(s) were accepted. **Important reminder tax return(s) being filed electronically will only be filed after fees are paid in full.**

Should the IRS or State tax authorities audit your return please let me know immediately (as soon as letters are received from the IRS or any other taxing authority), so I can react accordingly and be available to assist you. If Nessas Tax Service is at fault, your return will be corrected for free, and *Nessas Tax Service* will pay any applicable penalties. If *Nessas Tax Service* is not at fault, you will be responsible for paying any taxes owed, in addition to any fees for correction.

This agreement will conclude at the time completed returns are delivered to you (paper-filing), or upon submission of your tax return(s) (e-filing).

Under federal and Ohio law, *Nessas Tax Service* is required to file your returns electronically. However, you can opt-out of electronic filing without explanation. If you prefer not to e-file please contact me directly, so I can provide you with the government opt-out forms (included within the tax software).

To agree to this Letter and its summary of our arrangement, please sign below and return in person or electronically to [www.nessastaxservice.com](http://www.nessastaxservice.com) or vanessajones@nessastaxservice.com

Work will not begin until a signed copy of this engagement agreement is returned. Should you be filing a joint return, both spouses are required to sign.

Thank you for putting your trust in *Nessas Tax Service.* Please do not hesitate to reach out if you have any questions or concerns.

Happy Tax Season all the best,

*Nessas Tax Service*

Acknowledged by:

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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***Please Make all Checks Payable to Vanessa Jones***