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Terms and Conditions of Engagement

We appreciate the opportunity to work with you. This letter is to confirm the terms of our engagement and the nature and extent of the services we will provide for \_\_\_\_\_.

We will prepare your federal (and state) income tax returns for the year \_\_\_\_\_. We will not audit or verify the data you submit to us; however, we may ask you to clarify some of the information. We will be available to assist and guide you in gathering the necessary information by furnishing you with an organizer upon your request and by answering your questions.

It is your responsibility to provide all the information necessary to complete your tax returns. You should retain all the documents, receipts, and canceled checks and other records to substantiate the items of income and deductible expenses that are claimed on your return. Since you have the final responsibility for the information on your income tax returns, we highly recommend that you review the tax returns carefully before signing and filing them.

Fees for our services will be at our standard form rates. Additionally, we will be entitled to reimbursement for extra expenses that may include extra copies of returns, rerun fees, expense totaling, etc. Our invoices are due and payable upon presentation.

Our fee does not include responding to inquires or examination by taxing authorities or third parties, for which you will be separately billed for time and expenses involved. You agree to immediately notify us upon receiving any correspondence from any agency covered by this letter.

Your returns are subject to review by taxing authorities. If a question arises interpreting tax law, and a conflict exists between the taxing authority's interpretation of the law and other supportable positions, we will use our professional judgment in resolving these issues. Whenever possible, we will resolve said questions in your favor. If any interest or penalties are assessed, they will be your responsibility.

New privacy laws were established by the IRS effective January 1, 2009 and we are now prohibited from providing confidential information or copies to anyone other than you without your specific, written authorization.

According to the Affordable Care Act beginning in 2014 each individual is required to have health insurance, meet an exception or pay a penalty when filing a tax return. Starting in 2015 if you have health insurance coverage you will receive a form 1095 (A, B or C) from the healthcare marketplace, your insurance provider, or your employer. To ensure that the penalty is not included on your tax return you will need to include the 1095 form with your other tax items. If you received or believe you are eligible for an exemption please be sure to discuss this with your preparer.

If the foregoing is in accordance with your understanding of the terms and conditions of our engagement, please sign where indicated and return it to our office.

We wish to express our appreciation for this opportunity to work with you, and we are always available to discuss or clarify any part of this engagement letter with you.

Read and Accepted by: \_\_\_\_\_
Company Contact/Taxpayer Name Date Signed