

[Month Day, Year]

[First Last Name]

[Spouse First Last Name]

[City, State ZipCode]

[email@address]



Woodlands Tax
Advisors | Accountants | Advocates

Dear [Title LastName],

You have requested our firm's assistance with preparation and filing of your federal and state income tax return(s), and, where applicable, state income tax returns. In addition to preparing your returns for filing, we will provide you with a copy of the returns for your records.

We are required by law to file most income tax returns electronically. If your return cannot be filed electronically, or you request a waiver from the electronic filing requirement, we may require your approval and signature on a waiver document. In this case, we will supply you with paper copies and envelopes to send to the appropriate federal and state agencies.

All preparation and filing services are performed in Montgomery County, Texas. Your fee will be based on the complexity of your individual tax situation, and, in certain cases, the time required to prepare your tax return. You will be charged based on our fee schedule as published on our website. If you are a new client, you'll not be charged more than your previous paid preparer. Unless other arrangements are made in advance, we require payment of our fees when we file your returns or completion of our services for you.

We will prepare your returns based on information provided by you. By your signature below, you agree to provide all requested documents. Further, you agree to answer all questions fully and truthfully so we can accurately prepare your returns. Preparation of your tax returns does not imply any verification or other assurances related to the information you provide. We will not perform any auditing functions related to this engagement. You hereby acknowledge that it is your responsibility to provide all documentation in a timely manner. In the case of an audit or other inquiry from a government agency, you have verified all reported items on your return(s). Please note: some items, such as auto expenses, travel expenses, and certain charitable contributions, will require contemporaneous written records to substantiate a tax deduction.

The information you provide us will be kept confidential. However, our discussions are not protected by any form of attorney-client privilege. If, at any time, we deem it may be appropriate, we will advise you to consult with an attorney.

This agreement covers only the preparation of your tax return. It does not apply to services related to an audit of the return by a government agency, additional correspondence with a government agency,

or advocacy services that may be required after filing of your returns. If additional services are required, a separate agreement will be required.

We (I) have read and agree to the terms of this agreement:

_____ dated _____
[First Last Name]

_____ dated _____
[Spouse First Last Name]

_____ dated _____
Dana W. Jensen, EA
Woodlands Tax Advisors