

## CLIENT ENGAGEMENT

This Engagement Letter confirms the arrangements for our tax return preparation and accounting consulting services. All tax returns will be or have been prepared for you in accordance with the appropriate tax laws and regulations. Your returns will be prepared solely from the information provided by you. This engagement letter covers all tax periods we need to prepare for you including prior, current, and future.

**PRIVACY** All information is kept confidential. No one can obtain your information from our firm without your permission, except for a government agency following due process of the law.

**FEES DUE** All tax preparation and service fees are due and payable at the time of completion. Tax returns will not be e-filed until payment is received. A late charge will be assessed if your invoice is not paid within 15-days of the invoice date.  
**A retainer may be required to begin work.**

**FEES FOR PERSONAL CLIENTS** A list of our fees are located in our lobby. You may request a copy of this list at any time.

- **Tax Return Preparation**—Our fees are calculated based on a per form or schedule rate. You are billed for the forms and/or schedules needed to complete your tax return. Additional services may be required to complete your tax return.
- **Additional Accounting Services**—These services are billed at the current hourly rate. Services include small business bookkeeping, tax consulting, tax planning, RMD calculations, audit prep and representation, amended tax returns, research for the basis of stocks/bonds or assets bought or sold, NOLs, multi-state return allocation of income and deductions.

**FEES FOR BUSINESS CLIENTS** Our fees for business clients are based on a flat rate fee structure. If you are considering starting a business, please let us know so we can prepare a proposal that works for you.

**LETTERS** There is a minimum fee of \$75.00 per letter we need to draft and write at your request. Fees for this service are billed at the current hourly rate. We must have written authorization from you to release any information to a third party.

**IRS OR STATE LETTERS** If you receive a government letter, it may be because the government requires additional information, clarification, or that income has been underreported. Please contact us so we can determine the nature of the request. Additional fees may apply, billed at our hourly rate to assist you with this matter. If we find that Pace Accounting was at fault, we will correct the return at no charge to you and pay any penalties and interest accrued from the date of the first notice you received. We are not responsible for paying any taxes that you would have owed.

**REVIEW OF YOUR RETURN** Please carefully review your return(s) before signing them. Please feel free to reach out to us if you have any questions or concerns.

**Pace Accounting & Tax Services, Inc. is not responsible for providing any of the deductions taken on my/our tax returns(s). I/We have provided this information from my/our own records and have proof of all the deduction and income. I/We give permission to Pace Accounting & Tax Services, Inc. to prepare my/our tax returns(s) and have read, understood, and agree to the terms of this engagement letter. I/We have read and received both the firm’s Privacy Notice and the New York City Consumer Bill of Rights.**

**Primary Taxpayer**

Signature \_\_\_\_\_  
 Printed \_\_\_\_\_  
 Date \_\_\_\_\_

**Spouse/Partner**

Signature \_\_\_\_\_  
 Printed \_\_\_\_\_  
 Date \_\_\_\_\_

**WE APPRECIATE YOUR BUSINESS.** Thank you for allowing us to serve you this year.