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### Engagement Letter

This letter is to inform you of the services we will provide you and the responsibilities you have for preparation of your tax return.

### Tax Return Preparation

- We will prepare your 2020 federal, state and local tax returns based on information you will provide. Preparation of your return does not include any auditing or verifying the information provided by you.
- This engagement does not include any audit or examination of your books or records.
- We will use our professional judgement and experience in preparing your tax returns and resolving questions, if anywhere the tax law is unclear or where there may be different interpretations of the law. We will resolve such questions in your favor if there is reasonable justification in the applicable codes, regulations, and rulings for such a position.
- The fees for preparation of your income tax returns will be computed according to the forms and schedules that are needed, and the time involved to prepare your returns. Also included are any out-of-pocket expenses incurred and the cost of mailing the finished returns to you. If you terminate this agreement before completion, you agree to pay a fee for work completed.
- Fees are due and payable in full upon receipt of the finished returns. There will be a \$50.00 fee for processing any checks that are returned to us unpaid.
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
- The fee charged for tax return preparation does cover limited assistance and consultation during the year.
- The engagement to prepare your 2020 tax returns terminates upon delivery of your completed returns and original documents to you.

### Tax Payer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin work on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records.
- You will review the finished returns carefully before signing to make sure the information, including all Social Security numbers, is correct. If you find anything that is not in order, or that you do not understand, you will contact us immediately.
- You are responsible for all information reported on the returns. In the event your returns are audited by the IRS or state tax authority, you will be responsible for verifying the items reported. You must be able to provide written records of all items included on your returns. Please retain the information used in your tax returns for at least 3 years for a personal return and 10 years for a business return.
- If there is an error on the returns prepared from your data or if your return is filed and any tax due is paid late, you are solely liable for the payment of additional taxes that would have been properly due on the original returns and the interest charged by the taxing agency, since you have possession and use of the money. The responsibility for late filing or late payment penalties depends on whether or not the late filing or additional taxes resulted from you not getting all the necessary information to us by the prescribed deadline, or whether our procrastination or excessive workload, or if we were responsible for an omission or miscalculation of information you provided us in a timely manner,
- If the error is the fault of Penn-York Accounting & Tax Services, Inc., we will pay the interest and penalties under our Error & Omission Policy. Any additional taxes will be reviewed on a case by case basis to determine if the taxes would have been due on the original correct return.
- By signing below, you acknowledge that you have read, understood and accepted your obligations as explained above. For a joint return, both taxpayers must sign.

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Taxpayer \_\_\_\_\_ Spouse \_\_\_\_\_ Date \_\_\_\_\_