

BAUMANN TAX & BUSINESS SERVICES LLC

1017A South Main Street ~ West Bend, WI 53095

info@baumanntax.com ~ Phone: (262) 343-1800

CLIENT ENGAGEMENT LETTER

Client Name(s): _____

Client Address: _____

Subject: Preparation of Your 2024 Tax Returns

Thank you for choosing Baumann Tax & Business Services LLC to assist you with your 2024 taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your 2024 federal and state income tax returns. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. We are not responsible for documents that you fail to provide.

We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will inform you of any material errors, fraud, or other illegal acts we discover.

The law imposes penalties when taxpayers underestimate their tax liability. Call us if you have concerns about such penalties.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

Our tax prep fee is based on the required forms to prepare an accurate and complete tax return. Invoices are due and payable upon presentation. All accounts not paid within thirty (30) days are subject to interest charges to the extent permitted by state law. A \$35 NSF charge will be added for any returned payments (if applicable). **Additional services including, but not limited to, tax planning, tax projections, W-4 planning, audit services, etc. will not be handled during the tax season appointment. These services will be handled at a separate appointment, after tax season, for an additional disclosed fee.**

We will return your original records to you at the end of this engagement. Store these records, along with all supporting documents, canceled checks, etc., in a secure location in case these items are needed later to prove accuracy and completeness of a return. We will retain copies of your records and our work papers for your engagement for seven years, after which these documents will be destroyed.

Our engagement to prepare your 2024 tax returns will conclude with the delivery of the completed returns. If you have not chosen to e-file your returns with our office, you will be solely responsible for filing the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, sign the enclosed copy of this letter in the space indicated.

Thank you for the opportunity to be of service. If you have any questions, contact our office at 262-343-1800 or info@baumanntax.com.

Sincerely,

The team at Baumann Tax & Business Services LLC

(Both spouses must sign for preparation of joint returns.)

Accepted By:

Taxpayer

Spouse

Date

