

Jackson Tax & Accounting, LLC
1606 Main Street, Conway, SC 29526
Telephone: (843) 904-1040

Tax Return Terms of Engagement

Dear Client:

This letter confirms the arrangements for our tax return preparation services. We will prepare your Federal and State(s) income tax returns in accordance with the appropriate income tax laws. We will use our judgment in resolving questions where the law is unclear, or where there are conflicts between tax authorities' interpretations of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.

It is your responsibility to provide us with all the information needed to prepare complete and accurate returns. We will not audit or verify the data you submit, although we may need to ask questions for clarification. Our services do not include any procedures designed to discover defalcations or other irregularities should they exist. Any information we receive from you will be treated as confidential and is subject to disclosure by us only at your request or as compelled by law or for regulatory matters.

Fees for our tax preparation services will be based on our fee schedule, plus any out-of-pocket expenses and will be billed upon completion of your returns. Our fees for these services are based upon the amount of time required and complexity of the return. Fees are due upon presentation of our invoice to you.

Our advertised \$79.00 tax return is limited to two tax documents and includes Federal and SC State eFiling. This price does NOT include any additional forms and/or schedules. This supersedes any verbal commitment for a \$79.00 return.

Your returns are subject to examination by the taxing authorities. In the event of an audit, you may be requested to produce documents, records, or other evidence to substantiate the items of income and deduction shown on a tax return. If an examination occurs, I will represent you if you so desire; however, these additional services are not included in our fee for preparation of your returns.

If the tax services and terms outlined above are in accordance with your understanding of our engagement, please sign this letter in the space provided and return it to me. A copy of this letter is provided for your files.

We appreciate this opportunity to serve you. If you have any questions, please do not hesitate to call.

Sincerely,



_____ for Jackson Tax and Accounting, LLC.

Taxpayer Accepted:

By: _____ Print Name: _____

Date: _____