

Judy's Professional Services
Email address jpstoves@gmail.com

January, 2024

Subject: Preparation of Your Tax Returns

Thank you for choosing **Judy's Professional Services** to assist you with your **2023 or previous year** taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

I'll prepare your **2023** or previous year federal and/or state tax returns. I depend on you to provide us with the appropriate valid documentation needed to prepare a complete and accurate return. This engagement will also act as a written consent given **Judy's Professional Services** permission to prepare the tax return/s even if I am **NOT** present, and discuss the details via telephone or email. E-file will **ONLY** occur upon verbal confirmation and signature of **ALL** required documents.

I may ask you to clarify some items for verification, but will not audit the data you submit. You will contribute to efficient preparation of your return and help minimize errors.

I will perform services only as needed to prepare your tax returns. Our work will **NOT** include procedures to find irregularities. Please include all income documents received. **The law imposes penalties when taxpayers underestimate their tax liability.**

My fees are given to you. **All payments are due and payable upon receipt.** To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (30) days.

I return all original documents at the end of this engagement for you to store for your records, as these items may later be needed to prove accuracy and completeness of your return. I retain copies of your work for 3-5 years, after which these documents will be securely destroyed.

My engagement to prepare your tax returns will conclude with the delivery of the completed documents After **Mandatory E-Filing** your return with my office. Penalties can apply if not in compliance. Carefully review all tax return documents upon signing them.

Signing this engagement letter affirms your understanding for this work, please sign below & return to us along with your tax documents, and necessary completed forms to prepare an accurate tax return. **You can scan email to jpstoves1@gmail.com.**

I appreciate your trust and confidence in us. Please feel free to call if you have questions **646-271-0133**.

Sincerely,

Judy's Professional Services

Signature (s) Taxpayer

Spouse

Print name one signer _____

Date _____

Office copy

judy engagement letter