



PTS Company LLC

Dear Client:

Thank you for choosing our firm to prepare your income tax returns. This letter confirms the services we provide.

We will prepare your federal and state returns for the **Tax Year** _____ based on information you provide. Although our work will not include procedures to discover irregularities or inaccuracies in the tax data you provide, we may ask for clarification of certain information, or additional information, so that we may prepare accurate and complete returns for you.

It is your responsibility to provide all necessary information related to income and deductions, and to respond to our inquiries in a timely manner so that we may complete your returns by the appropriate due dates.

You are responsible for maintaining appropriate records, such as official tax documents you receive, receipts and substantiation for your deductions, and purchase and sales information for assets. These should be maintained in a safe place for at least six years. All documents may be scanned and stored in that format after three years.

It is your responsibility to review your returns before they are filed to determine that all income has been correctly reported and that you have substantiation for your deductions. Filing your returns any paying any balance owed by the due date is your responsibility.

If your returns are later selected for review or audit by taxing authorities, we will be glad to assist or represent you if you desire. Our fees for preparing your returns do not include time that might be necessary to assist you during a taxing authority review. Representation on your behalf with the Internal Revenue Service is billed on an hourly basis.

Our fees for preparation of your returns are based upon our standard billing rates plus out-of-pocket expenses. Our invoices are due and payable upon presentation prior to our release of the tax return.

If this letter accurately summarizes your understanding of our agreement relating to the preparation of your returns, please sign both copies in the space indicated and return one copy to us.

Thank you again for choosing PTS Company to prepare your tax returns. We hope you will recommend us to your friends. Our best clients come from our current great clients, and we appreciate your business.

Sincerely,

Mary Shuman, EA

Mary Shuman, Enrolled Agent

Date:

Accepted by:

Signature

Date

Printed Name

Signature

Date

Printed Name