



***Shoreline Tax and
Bookkeeping Services LLC***

Deborah DeRusha, EA

Engagement Letter for Individual Tax Return Preparation

This letter is to inform you, the taxpayer, of the services we, Shoreline Tax and Bookkeeping Services LLC, will provide and the responsibilities you have for preparation of your tax return.

Tax Return Preparation

- We will prepare your 2023 federal and state tax returns based on information you provide. Services for preparation of your return do not include auditing or verification of information provided by you. In the event your return is audited, you will be responsible for verifying the items reported.
- The tax return preparation fee does not include bookkeeping.
- The tax return preparation fee does not include audit representation.
- The tax return preparation fee does not include the review of and/or responding to correspondence from taxing authorities (unless related to a firm error).
- The engagement to prepare your 2023 tax returns terminates upon delivery of your completed returns and original documents to you. Please store your supporting documents and copies of your tax returns in a secure place for at least seven years.

Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working 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. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the return carefully before signing to make sure the information is correct.

***69 Old Post Road
Clinton, CT 06413
(860) 552-4843***



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Fees. Our fee for tax return preparation services for individuals is **\$250/hr (\$250 minimum)**.

Related administrative time (e.g., scanning documents, printing paper returns, etc.) will be billed at **\$85/hr**. Our fee must be paid before our office will file your returns, unless other payment arrangements have been made. If you terminate this engagement before completion, you agree to pay a fee for work completed. Please note, balances over 30 days are subject to 1.5% interest per month.

Signatures. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities and that you understand our responsibilities in preparing your tax returns as explained above. For a joint return, both taxpayers must sign.

Taxpayer Signature	Date	Spouse Signature (if MFJ)	Date
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