

MICLEAN TAX SERVICE ENGAGEMENT AGREEMENT

This engagement agreement is between (client) _____ and Miclean Tax Service. The California Business and Professions Code and the Internal Revenue Service require tax preparers to follow certain procedures. The intent of these procedures is to protect you, the client. Maintaining a clear understanding between us is the best possible way to have a mutually satisfying working relationship. I look forward to assisting you with your taxes this year. Please read the information below and sign this letter in acknowledgment of your understanding and agreement to the terms stated below.

1. All information used in the preparation of my tax return was supplied to Miclean Tax Service by me, the taxpayer, and I have in my possession all documents and records substantiating this information.
2. I will be provided with either a paper copy or a PDF copy of income tax returns. We do charge a \$25 fee for each additional copy. Please Initial_____
3. I have been advised to keep these copies of my tax returns as well as all documents used in the preparation of my return for the **next 5 years**.
4. I have maintained adequate records to substantiate all claims for use of automobile, meals, lodging, entertainment and charitable contributions. **Substantiation is required by law.**
5. This agreement covers only the preparation of your tax return. Fees for your tax return will be based on the time spent and the complexity of the tax return. Payment for your tax return is due at the time of tax preparation. Payment for electronically filed returns is to be made before the tax return is electronically filed. Miclean Tax Service reserves the right to charge a late fee of 12% per annum on all accounts due over 30 days. I agree, if Miclean Tax Service is required to initiate legal or collection proceedings to obtain payment of billing, the costs for same will be added to the amount of my bill. Both parties agree that there is a one-year limitation period to bring a claim against us for errors and omissions. The one-year period will begin upon the date of the tax professional's signature on the tax returns covered by this engagement letter.
6. For tax consultations, examination by taxing authorities, and other services separate fees will be quoted.
7. I understand that the policy of Miclean Tax Service is to handle the information I provide to them with the utmost confidentiality and care. Miclean Tax Service restricts access to nonpublic personal information. Only those who need this information to complete the work you have hired us to do will have access to such information. We will not disclose your personal and confidential information to anyone outside the office without your **express written permission**, unless under law we are required to do so.
8. Miclean Tax Service is required by the State of California to e-file all tax returns. We will comply with that regulation this year by e-filing both your state and federal tax returns.

Information outlined above relates to all tax returns completed by this office on your behalf in 2017.

I have read the above terms of the engagement letter and agree with the terms of this engagement.

Tax Client Signature

Date