

This letter is to inform you, the corporation and corporation representative (taxpayer), of the services we will provide you, and the responsibilities you have for preparation of your tax return.

**Tax Return Preparation**

- ❖ We will prepare your 2023, and only your 2023 Federal and Specific State(s) and City business tax returns from information you furnish us.

**Federal Income Tax Return**

- \_\_\_ Estate or Trust – Form 1041
- \_\_\_ Partnership – Form 1065
- \_\_\_ C Corporation – Form 1120
- \_\_\_ S Corporation – Form 1120S
- \_\_\_ Non-Profit – Form 990

**Pennsylvania Income Tax Return(s)**

- \_\_\_ Estate or Trust – Form PA-41
- \_\_\_ Partnership – Form PA-65
- \_\_\_ Corporation – Form PA-RCT-101
- \_\_\_ S Corporation – Form PA-20S
- \_\_\_ Non-Profit Form BCO-10

**List any Business Privilege Tax Return(s) needed:** \_\_\_\_\_

- ❖ This engagement does not include any audit or examination of your books or records. 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. Additional fees apply for these services.
- ❖ Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
- ❖ Office consultations and teleconferences are subject to additional fees.
- ❖ 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. You may be assessed a fee if you request a copy in the future.

**Taxpayer Responsibilities**

- ❖ You agree to provide us with a trial balance and other supporting data necessary to prepare your tax returns. 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 income, expenses, or other deduction amounts are accurate; **all income including barter, consumer to-consumer activity, cash-based income and all other income whether received in-person, in-kind, or electronically.** You have all required supporting written records. We may ask to review your documentation.

**Note: Congress and the IRS are very aggressively pursuing cryptocurrency activity, reporting and tax situations. Failure to report crypto-currency activity of any type, including sales, staking, mining, lending, NFT activity, trades and other activities must be reported on your return, so you also acknowledge that you have reported all crypto currency activity to us.**

- ❖ 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.
- ❖ Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this
- ❖ Engagement before completion, you agree to pay a fee for work completed. **A retainer may be required for preparation of returns.**

**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.

\_\_\_\_\_  
Corporation Name                      Corporation Representative                      Title of Representative                      Date

*Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to any third party without your express permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.*