ALPHA TAX SERVICE

Client Engagement Letter

Please read, sign, and return before we begin work

alphatax200.com
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This letter sets out the terms on which Alpha Tax Service will prepare your tax returns. It is here so that we both know what we have agreed, what we each need to do, and what to expect. Please read it, sign at the end, and return it through the secure client portal at alphatax200.securefilepro.com or bring it to your appointment.

WHO THIS IS BETWEEN

CLIENT NAME	SPOUSE NAME (IF FILING JOINTLY)	TAX YEAR

TERMS

1. What we will do

We will prepare the federal, state, and local income tax returns you engage us to prepare for the tax year shown above, using the information you give us. Anything not named above is a separate engagement — that includes bookkeeping, payroll, prior-year returns, amended returns, tax planning, and representing you in an examination.

2. What we will not do

We do not audit, review, or verify the information you give us. We prepare your return from what you provide. Our work is not designed to detect error, fraud, or theft, and we are not responsible for doing so. Where the law requires supporting evidence for a deduction or credit, we may ask you for it, and we may decline to claim an item if it is not supported.

3. What you are responsible for

Giving us complete and accurate information in good time; keeping the records that support the income, deductions, and credits on your return; reviewing the return before you sign it; and telling us if anything changes. The return is yours. By signing it you are confirming that it is correct to the best of your knowledge.

4. Your records

You are responsible for keeping your own records. Keep the documents supporting your return for at least three years from the date it is filed, and longer for property records, business assets, and anything carried forward to a later year. We keep a copy of the return, but we are not your record-keeper.

5. Fees

Our fee depends on the complexity of the return and the time it takes. We will tell you the fee before we begin work, and we will tell you before doing anything that goes beyond what is described above. Payment is due when the return is delivered to you unless we have agreed otherwise in writing.

6. Filing and extensions

We file electronically wherever possible. We cannot transmit your return until you have signed Form 8879. If your information reaches us too close to the deadline, we may need to file an extension. An extension gives you more time to file — it does not give you more time to pay, and interest and penalties can still apply to tax paid late.

7. Confidentiality

We keep your information confidential and hold it securely. We will not disclose or use your tax return information for any purpose other than preparing your return without your written consent, given separately in the form the IRS requires.

8. How to send us documents

Send documents through our secure client portal at alphatax200.securefilepro.com. Please do not email tax documents, Social Security numbers, or account numbers, and do not submit them through any form on our website, which will refuse them if it recognizes them. If you would rather bring paper to the office, that is always fine.

9. If we make a mistake

Tell us. We will correct it and prepare any amended return needed at no charge for our time. We are responsible for our own errors, but not for tax you genuinely owed, and not for interest or penalties arising from information that was not given to us, was given late, or was inaccurate.

10. Ending this engagement

Either of us may end this engagement by telling the other in writing. If that happens before your return is filed, you remain responsible for our fee for the work already done, and we will return your documents to you.

11. How long this applies

This letter covers the tax year shown above and continues to apply to later years unless one of us replaces or ends it in writing. It is governed by the laws of the Commonwealth of Kentucky.

AGREEMENT

By signing below you confirm that you have read this letter, that you understand it, and that you agree to these terms.

CLIENT SIGNATURE

SPOUSE SIGNATURE (IF FILING JOINTLY)

DATE

FOR ALPHA TAX SERVICE

DATE