

Evanoff Accounting Services, LLC

SIGN AND RETURN

2024

1040-Individual Tax Return Engagement Letter & E-Mail Authorization

Dear Client:

This letter is to confirm and specify the terms of my engagement with you and to clarify the nature and extent of the services I will provide.

I will prepare your 2024 federal and state income tax returns from information that you will furnish me. I will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information, so that I can prepare accurate and complete returns. A questionnaire to guide you in gathering the necessary information is included with this engagement letter.

My fee for these services will be due and payable upon completion and presentation of the returns. I will not electronically file a return if the fees are not paid.

It is your responsibility to provide all of the information required for the preparation of complete and accurate returns. You should retain all the documents, canceled checks, logbooks, receipts, and other data that form the basis of income and deductions as required by law. These may be necessary to prove the accuracy and completeness of the returns to any taxing authority. You represent to me that the information you are supplying to me is accurate and complete and that any expenses claimed for meals, entertainment, travel, business gifts, dues and memberships, vehicle usage, and/or charitable contributions are supported by records required by law and that you have disclosed all unknown tax liabilities. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them.

My work, in connection with the preparation of your income tax returns, does not include, any procedures designed to discover defalcations or other irregularities, should any exist. I will render such accounting and bookkeeping assistance as determined to be necessary to prepare an accurate income tax return. You understand that I will not audit or otherwise verify any information; however, I may require clarification or additional information, which you will timely provide. In addition, I am not responsible for disallowed deductions or the inclusion of additional unreported income or any resulting taxes, penalties, or interest due to an examination or inquiry (notices) by the taxing authorities.

I will use professional judgment in resolving questions where the tax law is unclear or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. Unless otherwise instructed by you, I will resolve such questions in your favor whenever possible.

In the unfortunate event that your return is selected for an examination or inquiry (notices) by the taxing authorities, any proposed adjustments are subject to certain rights of appeal. In the event of such a government tax examination or inquiry, I will be available upon request to represent you. My fees for preparing your returns do not include time necessary to assist you during an examination or inquiry. You understand that in the event of preparer error, you are responsible for the additional tax, penalty, or interest that may be due.

The filing deadline for the tax returns is April 15, 2025. In order to meet this filing deadline, your information should be received by me no later than April 1, 2025. If an extension of the time is required, and any tax that may be due with your return must be paid with that extension. An extended return is due October 15, 2025. Any amounts not paid by April 15, 2025 are subject to interest and late payment penalties when those amounts are actually paid. A timely filed extension only extends the time to file not to pay. Filing your returns by the due dates is your responsibility.

At times you may wish to communicate with Evanoff Accounting Services, LLC via e-mail. By signing below, you authorize me to transmit confidential information, including, but not limited to, tax and financial data over the internet. You, as the individual and authorized signer, accept the inherent risks associated with sending data via e-mail. You agree that Evanoff Accounting Services, LLC is not liable for any damages that may result from those inherent risks associated with sending confidential information via e-mail pursuant to this authorization including, but not limited to, interception by a third party or unintentional inclusion of an authorized recipient.

This email authorization remains in effect until notification is provided to Evanoff Accounting Services, LLC in writing (either by mail or facsimile transmission) that the authorization is revoked. This authorization may be revoked at any time.

If the foregoing fairly sets forth your understanding, please sign this letter in the space indicated and return it to *my* office. You may return the letter with your tax information. However, if there are other tax returns you expect me to prepare, such as a gift and/or sales tax, please inform me by noting so just below your signature at the end of the letter.

I want to express our appreciation for this opportunity to work with you.

Sincerely,

Susan Evanoff, EA

Please indicate which forms to prepare in addition to the federal form:

Minnesota _____ Minnesota Property Tax _____ Wisconsin _____ Other _____

Foreign Income Matters:

At any time during 2024, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country? Yes ___ No ___ (Even if you had only \$5.00 in a foreign savings account you must answer Yes)

Virtual Currency:

At any time during 2024, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency? Yes ___ No ___ If yes please provide details.

Charitable Donations:

Do you have documentation for your donations? Yes ___ No ___

PORTAL: Do you want a link sent to create a client portal? _____

Taxpayer Signature: _____ **Date** _____ **Email** _____

Taxpayer Print Name: _____

Spouse Signature: _____ **Date** _____ **Email** _____

Spouse Print Name: _____

Comments or additional request:
