

Edmundson CPA, PLLC

Please sign on reverse and return with the rest of your tax information

This letter confirms the arrangements for our tax services. We will prepare the following: (Please check all that apply; if you do not check a box or list a return we will **not** prepare it)

- 2022 Federal income tax return
- 2022 North Carolina income tax return
- Other states/localities

We will prepare these returns from information you furnish us. We may ask for clarification of some items, but we will not audit or otherwise verify the data you submit. If requested, we have enclosed an “Organizer” to help you gather the information required for a complete return. If you use the Organizer, it will help you avoid overlooking important information and contribute to efficient preparation of your returns. That helps keep the cost of our services as low as possible.

If you own a Limited Liability Company (LLC), you must prepare and file the annual report directly with the applicable state agency (for NC this is the Secretary of State). You must also pay any annual report or license fee (NC has an annual report fee). Edmundson CPA, PLLC is not responsible for preparing or filing the report nor are we responsible for reminding you to do so.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, canceled checks, and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the tax returns and, therefore, you should review them carefully before you sign them. Our services will be concluded by the delivery to you of the returns specified above.

The law provides various penalties that may be imposed when taxpayers understate their tax liability, file late, or pay late.

You agree that in the event your return cannot be completed by the due date, it may become necessary for us to apply to extend the due date. Applying for an extension of time to file may extend the time available for a taxing authority to undertake an audit of your return. **Additionally, failure to pay by the original due date may result in penalties and interest.**

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Our charges are based upon the complexity and value of our work and are due upon delivery of the returns. We will bill you for any direct out-of-pocket expenses. Interest is charged at 18% per annum (1.5% monthly) on all unpaid invoices and a \$25 returned check charge is applicable. Any fee estimate or quote given is only an estimate, not a fixed fee.

Your returns may be selected for audit by a taxing authority. Any proposed adjustments are subject to appeal. In the event of a tax examination, we can arrange to be available to represent you. Such representation will be a separate engagement for which an engagement letter will be provided to you. Fees and expenses for defending the returns will be invoiced in accordance with terms we agree on for that engagement.

If any portion of this engagement letter is deemed invalid or unenforceable, that will not invalidate the remainder of this engagement letter. We agree that the courts of the State of NC have jurisdiction over the parties and all disputes between us and we agree to submit all disputes to the Wake County Superior Court, which is the proper and most convenient venue for resolution. We also agree that the law of the State of NC shall govern all such disputes.

If the above fairly sets forth your understanding of our agreement, please sign this letter and return it to us when you bring in your information. We are pleased to have you as a client and look forward to a long and mutually satisfying relationship.

Approved:

Sincerely,



Andrew H. Edmundson
Edmundson CPA, PLLC

Signature

Date

Signature

Date

Printed name(s)

I(we) would like a paper copy of our returns in addition to the standard electronic copy.