



506 W. Dixon Blvd.
Shelby, NC 28152
(704) 484-9980

www.abttaxservice.com

Thank you for choosing ABT Tax Service, Inc. to assist you with your income tax returns. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your federal and state income tax returns. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. An organizer is provided to assist you in collecting the data required for your return. The organizer will also help you avoid overlooking important information. By using it, you will contribute to the efficient preparation of your returns and help minimize the cost of our services.

The law imposes penalties when taxpayers underestimate their tax liability. Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

In the event of an audit, you may be requested to produce documents, records, or other evidence to substantiate the items of income and deduction shown on a tax return. Any proposed adjustments by the examining agent are subject to certain rights of appeal. If an examination occurs, we will represent you if you desire; however, these additional services are not included in our fee for preparation of your returns.

Our tax return pricing follows a form based structure, meaning you are charged per form required to complete your return. ***Therefore, all bookkeeping services, including totaling receipts, determining cost basis, calculating mileage, per diem, etc. will be billed in addition to the standard return pricing.*** Invoices are due and payable upon presentation. All accounts not paid within thirty (30) days are subject to interest charges to the extent permitted by state law.

We will return your original records to you at the end of this engagement. You will also be provided with a complete client copy of your returns. Store these records, along with all supporting documents, canceled checks, etc., in a secure location in case these items are needed later to prove accuracy and completeness of a return. We retain copies of your records and our work papers for your engagement for three years, after which these documents will be destroyed. There will be a \$25 fee per request if additional copies are needed.

Our engagement to prepare your tax returns will conclude with the delivery of the completed returns to you (if paper-filing) or your signature and our subsequent submittal of your tax return (if e-filing). If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax-return documents carefully upon completion and notify us of any discrepancies before signing them.

In order that we may properly advise you regarding tax liability, please keep us informed of any significant changes in your employment status, financial affairs, or of any correspondence received from taxing agencies.

Our Client Care Plan is an optional service available for purchase each year at the time of preparation. This plan includes two hours of billable time after tax season, either via phone or in person, unlimited copies of tax returns for banking needs, assistance with financial aid applications for college, and replies to any correspondence from a taxing authority regarding the year of coverage. Also included is a customized planning session, held in May, in which we will discuss the impact of new legislation for your 2020 return. We will make recommendations regarding your specific situation to

ensure we implement the necessary steps to utilize the new law to your advantage. We will also provide a review of your withholding and/or estimated tax payments in comparison to your tax liability. The Client Care Plan is an additional service of ABT Tax Service, Inc and can be purchased for \$150 per year. ***Please note, unless you elect coverage under the Client Care Plan, any additional service(s) required after the completion of your return will be billed at an hourly rate of \$150/hour billed in 1/4 hour increments.*** By signing below, you acknowledge notification of our new policy. If you wish to purchase the Client Care Plan, additional signature(s) are required on the Client Care Plan Agreement to follow.

Lastly, our office uses an automated messaging system to notify our clients. Examples of such notifications include, but are not limited to, appointment reminders, payment due date notifications, current offers, and updates regarding pending legislation. By signing below, you agree to receive messages at the phone number provided.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign in the space indicated below.

Thank you for the opportunity to be of service. If you have any questions, contact our office at (704) 484-9980.

Sincerely,
ABT Tax Service, Inc.
(Both spouses must sign for preparation of joint returns.)

Accepted By:

Taxpayer

Spouse

Date