

EB Tax Service

"KNOWLEDGE IS T.I.M.E., DURING TAX TIME"

817A KING STREET, SUITE 301 - ALEXANDRIA, VA 22314
PHONE: 703-549-6747 FAX: 703-549-6754

PLEASE READ BELOW:

This represents a Sample Engagement Letter. This Engagement Letter is a contract between EB Tax Service and all clients. The engagement letter will be modified for each client. Please review this "Sample Engagement Letter". The sample provides the basic structure of the Engagement Letter. We will provide all clients an engagement letter before we provide tax services. The engagement letter will be e-mailed or mailed to your home address. Please sign the engagement or forward the e-mail back with okay or your Personal Identification Number (PIN), which we will provide you.

"Sample Engagement Letter"

Mr. John Smith
1234 ABC Street
Suitland MD 20746

Subject: Engagement Letter

Dear Mr. John Smith:

This letter sets for our understanding of the terms and objectives of our engagement to provide the following tax preparation services:

- Federal Tax Return for the year 2002 (**We will enter your Federal Form and Schedules**)
- State Tax Return for the year 2002 (**We will enter your State Tax Form**)

We have processed the above forms using the financial and tax information you provided us. **If you qualify for the Federal Earned-Income Credit (EIC). We are requesting a copy of your dependents' social security card to verify your qualifications for EIC.** The information was compiled using tax software, federal and state tax laws, and our tax knowledge. The following information will be provided in your tax package.

- Federal Acknowledgement Letter
- State Acknowledgement Letter
- Two-Year Summary Sheet (new clients must provide last year's return)
- Copies of Federal and State Returns
- Client Invoice

Continuation
Engagement Letter

These services are only for tax preparation. These services should not be relied on as a substitute for your own business judgment, nor are they meant to mitigate the necessity of an ongoing review. In addition, these services are not designed to discover fraud, irregularities, or misrepresentations made in materials provided upon request by us or other professionals, including but not limited to:

- Accounting and auditing services
- Drafting legal documents such as pension plans, wills, trusts, or other agreements and contracts
- Review and analysis of proposals to purchase life insurance
- Other services not specifically outlined herein

We expect our fee to range between **(\$ Estimated Price)** and **(\$ Estimated Price with additional \$30 for Refund Now Fee)**. We will bill you through our e-file company **Refund Now**. We are requesting the following information to e-file your Federal Tax Return:

- Confirmation of your Personal Identification Number {PIN} **(four digit number)** by e-mail or signature
- Signed application for electronic refund account
- Driver's License
- Two Forms of ID unless you're a prior client
- Copy of 2001 Tax Return (if you're a prior client we have this information)

If we become aware of circumstances that will cause our fee to exceed this amount, we will notify you and obtain your approval before performing any additional work.

If this letter correctly set forth your understanding of the terms and objects of the engagement, please indicate by signing the enclosed copy and returning it to us. **If by any reason this engagement is terminated by you or EB Tax Service for irreconcilable differences, there will be a \$30.00 administrative fee for personal tax returns and a \$100 fee for business returns assessed to you. If we provide any preparation services such as (inputting figures or tax advice) this would qualify as an administrative fee. We may request this \$30 or \$100 administrative fee before processing your return.**

Sincerely,
EB Tax Service

This letter sets forth my understanding of the terms and objectives of the engagement to provide tax preparation services.

Signed: _____ Date: _____