



Primary Tax Client Name: \_\_\_\_\_

**Tax Return Preparation Engagement & Acknowledgement Letter**

Thank you for selecting **E-Simon Tax & Multi Services** to assist you with your tax affairs. This letter confirms the terms of our engagement with you and the nature and extent of services we will provide. We will prepare your 2019 federal and all state income tax returns you request using information you provide to us. We may ask for clarification of some items, but we will not audit or otherwise verify the data you submit.

It is your responsibility to provide information required for preparation of complete and accurate returns. You should keep all documents and all other data that support your reported income and deductions since you are solely responsible for the returns and providing any documentation requested by the IRS.

In the event a particular form, expense, or information is used to prepare your tax return such as but not limited to Sch. A, Sch. D, Sch. C, American Opportunity Credit (AOTC), Earned Income Credit (EIC), and/or Child Tax Credit (CTC) and the IRS requested documentation, you are solely responsible to provide documentation or you could be responsible for full repayment and/or penalties/fees.

INITIAL  
DATE

*If Applicable:* I am aware that my return may include AOTC, EIC, CTC, and/or Sch. C forms. After my preparer has reviewed all requirements to be eligible for these forms, I verify that I meet the requirements. If necessary, I will provide documentation to the IRS. I verify any business income/expenses are provided and verified by me on the Taxology self-employment ledger and/or actual Sch-C form. If I did not provide a 1098t for the AOTC, I verify any qualified education expenses are provided and verified by me on the Taxology Education Expense Form and/or actual Education 8863 form.

We must use our 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. In order to avoid penalties, we will apply the "more likely than not" reliance standard to resolve such issues. Our work will not include any procedures to discover defalcations or other irregularities. You agree to honor our decisions regarding the need to make protective disclosures in your returns.

INITIAL  
DATE

I acknowledge, accept, and understand that tax preparation is based on the complexity of the return, the number of schedules and forms necessary and required by the taxing authorities to complete an accurate final return plus any out-of-pocket the transmitter ( E Tax Filing ) may incur. Further, I have been advised by my preparer that there is a payment for the preparation of the return and he/she has provided me with all information, cost and fees required and in connection with the preparation of my return. I have read, understood, and acknowledged the above items have been disclosed and explained to me in regards to the preparation of my tax return and accept all fees related to it.

Penalties can be imposed on you for failing to disclose participation in "reportable transactions," that is, certain arrangements the IRS has identified as potentially abusive. The law imposes penalties when taxpayers understate their tax liability. If you have concerns about such penalties, please call us.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign this form either manually or via electronic signature.

*Sincerely,*

E-Simon Tax & Multi Services  
10570 S Federal Highway 1 Suite 300  
Port Saint Lucie, FL 34952

**Primary Tax Client Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_