



XAT INCOME TAX

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Engagement Letter

I have engaged Xat Income Tax to prepare my Individual (1040) Federal, state and city (whichever is necessary) income tax returns. I understand that it is my responsibility to provide all of the information required to complete my tax return. In that regard I state that, to the best of my knowledge and belief:

1. I am past due for child support and/or student loans in the amount of \$ _____.
2. I owe IRS for prior year obligations in the amount of \$ _____.
3. I understand that for Earned Income Credit (EIC) dependents must be my (or my spouse's) child, grandchild, brother, sister, niece, nephew and/or eligible foster child. Cousins are not allowed.
4. The name, year of birth and social security number of every dependent I provide must match exactly to social security records. If not, IRS will reject my return and an additional \$10 will be charged each time the return has to be resent.
5. **There is a fee of up to \$50 per year for entering my information into the system, if the tax return has been completed, and I choose not to have Xat Income Tax file it. Upon request, estimates are available before actual tax preparation has started.**
6. If I plan on having my fees for tax preparation taken from my refund, I understand that there are additional costs by the companies that are used to process my refund and collect the fees.
7. Upon completion and payment of my tax return I will be given a copy for my records. Additional copies for current clients will be \$20 per set. Copies of support papers will have additional fees.
8. I understand that you will not audit or verify any information, that additional information may be required by Xat Income Tax; that you are not responsible for disallowed deductions or the inclusion of additional unreported income or any resulting taxes, penalties or interest.
9. ***I understand that I will be charged an additional fee if you are asked to assist or represent me in a tax audit, examination, or inquiry.*** I understand that in the event of preparer error, I am responsible for additional tax that may be due, and that the extent of responsibility of Xat Income Tax and the preparer is limited to payment of penalty and interest due as of the date of the first notice of the error:
10. I will contact Xat Income Tax immediately if I discover additional information that will lead to a change in my tax return, or if I receive any letters from any taxing authorities.
11. *I understand that your bill will be due and payable upon completion of the returns, and that additional services will not be performed until the bill for these services is paid in full.*

I have read, understand, and accept the conditions of the engagement letter discussed above.

Taxpayer Signature _____ Date _____

Printed Name _____

Spouse Signature _____ Date _____

Printed Name _____