



979.828.1410  
979.828.1268 Fax  
P.O. Box 1370  
605 W Hwy 79, Suite 3  
Franklin, TX 77856

This Engagement Letter is to confirm the arrangements for our tax return preparation services. We will prepare your Individual and/or Business Federal and State Income Tax Returns for calendar year 2022 in accordance with appropriate tax laws and regulations.

**We will prepare your 2021 federal and state personal income tax returns from information you furnish us.**

We will not audit or otherwise verify the data you submit, although it may be necessary to request clarification and/or documentation of some of the information. Generally, we will rely on your representation that you have maintained the documentation required by law to support the information you provide, including expenses for meals, travel, gifts, vehicle use, charitable contributions, etc. If you are not clear regarding what documentation is needed for any given item of income or deduction, we'd be happy to discuss it with you. **Note that you have the final responsibility for the income tax returns and, therefore, you should carefully review them before you sign and file them.**

**ALL TAX PREPARATION FEES ARE DUE AND PAYABLE UPON COMPLETION OF RETURN(S).** THIS MEANS YOU WILL OWE OUR FEES REGARDLESS OF WHETHER YOU ELECT TO FILE THEM OR NOT. **Your return will not be filed until we receive payment in full and signatures on all applicable forms.**

**Tax preparation services are based on a fee schedule charged per form(s)/schedule(s) needed to complete your return(s).** Fee schedules are displayed in the front office. Additional charges may include: research basis of stocks/bonds or assets sold, NOL's, multi-state returns filed, and bookkeeping for an entire year, tax consultation for estimates, amended taxes for prior year, FAFSA reports, which are identified separately on your invoice.

Other services provided: Bookkeeping, business consultation, set up of new businesses, representation in audits, and offers in compromise to get control of back taxes owed. These are billed at an hourly rate and paid on the day of the appointment. **Bookkeeping fees are charged at: \$ 70 per hour for non-retainer clients**, a minimum of one hour will be billed. **Representation before the IRS, including calls or visiting IRS offices will be billed at \$ 100 per hour.**

**You will have a maximum of 24 months to collect your documents after preparation before they are securely destroyed.**

Thank you for allowing us to serve you this year! **WE GREATLY APPRECIATE YOUR BUSINESS!**

This Engagement Letter will serve to apply to all future years unless the agreement is terminated or amended in writing by the taxpayer or preparer.

Sincerely,  
Pueblito Tax Services

Pueblito Tax Services is not responsible for providing any of the deductions taken on my tax return(s). I have provided this information from my own records and I have proof of my deductions and income. I (we) give our permission to prepare my (our) tax return(s) and I (we) have read, understood and agree to the terms of this engagement and I (we) have read the Private Policy Act of this firm on the reverse side of this letter.

\_\_\_\_\_  
Taxpayer

\_\_\_\_\_  
Date

\_\_\_\_\_  
Taxpayer

\_\_\_\_\_  
Date





979.828.1410  
979.828.1268 Fax  
P.O. Box 1370  
605 W Hwy 79, Suite 3  
Franklin, TX 77856

## Privacy Policy

It is the policy of Pueblito Tax Services to keep **all information that we collect from you, confidential** from all sources. We restrict access to all nonpublic personal information about you to members of our firm who need to know that information to provide services to you. We do collect nonpublic personal information about you from the following sources:

- Information we receive from you on tax preparation organizers, worksheets, Federal and State tax reporting forms,
- and from other documents we use in tax preparation or other financial and related services.
- Information about your transactions with us, our affiliates, and others.
- Information we may receive from outside agencies such as banks and brokerage houses.

We do not disclose any nonpublic personal information about our clients or former clients, except as permitted, required, or approved by you in writing as listed below:

- Requirements to comply with federal, state or local law.
- Requirements to comply with national, state or local licensing rules.
- Requirements to disclose information in response to legal subpoenas.
- Items you permit or request us to disclose, as authorized by you in writing.
- Information that you authorize us to disclose by signing this engagement letter to electronically file your tax return.
- Information that you authorize us to disclose by signing this engagement letter, which discloses that you are our client, without disclosure of financial or other personal information.

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

\_\_\_\_\_  
Taxpayer

\_\_\_\_\_  
Date

\_\_\_\_\_  
Taxpayer

\_\_\_\_\_  
Date

