THE FINANCIAL ADVISORS LLC

Financial Planning & Investment Management

TFA Tax Preparation Engagement Letter

2022 Personal Income Tax – US 1040 & State(s)

Thank you for choosing The Financial Advisors, LLC for your 2022 Federal and related state(s) personal income tax preparation. We appreciate your trust and business.

Our responsibilities:

- Thorough, accurate, timely completion of your tax filings based on the information that you provide.
- Compliance with IRS and Treasury Department regulations and related state procedural, disclosure, and privacy protection regulations. Our Privacy Policy statement is included with this engagement letter.
- Clear, written explanations for specific advice and positions taken for the tax preparation.
- Representation to assist in matters of examination (tax audit), collections, or appeals is a separate engagement *not* included in this tax preparation engagement.

Your responsibilities:

- Provide accurate, complete tax reporting documents and related information for the income, deductions, and facts and circumstances necessary to complete your tax returns. We do not audit or verify the information that you provide.
- Maintain records in your files to substantiate items reported on the tax returns.
- Contact us promptly if new information is obtained that may change your tax returns or if you receive a notice from the IRS or state taxing authority.
- Carefully review your completed tax returns before you sign and date the returns. You have the final responsibility for your filed tax returns.

Costs:

Fees for tax preparation are based on complexity, data volume, time, and required expertise. Payment is due on delivery of the completed tax returns.

Checks payable to: ***The Financial Advisors, LLC***

PayPal to: ***info@the-financial-advisors.com***

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Processing notes:

- All source docs are scanned / merged into a PDF file and we work from that consolidated PDF file
- Please leave pages loose or use paper clips; all staples must be removed to scan
- Mobile device photos are difficult to process – please send paper docs if you cannot scan the paper records.
- Delivering your tax information:
    - **Electronic:** Please use ***ShareFile*** instead of email to better protect personal information. Use your own ShareFile account or the respective office file drop. Access links are in the ShareFile section of our web site under Client Access. Fax is acceptable as an alternate electronic method.
    - **Mail:** USPS or private delivery to the respective Andover or Newburyport office.

Bank Account Information for Refunds and Balance Due Payments:

Please provide bank account information with your tax documents or include below to confirm the account to use for direct deposit of refunds or direct debit (electronic funds transfer) for balance due payments. This information must be verified each year. Include a VOID check for any new account.

Type of account: ☐ Checking ☐ Savings

Name of Bank/Institution: ________________________

Routing (ABA) Number: ________________________ (9 digit bank ID # in lower left of check)

Account Number: ________________________ (your account #)

Please sign and date below to confirm your understanding and acceptance of these terms for personal income tax preparation services. See the Tax Center on our web site for additional tax reference information.

Sincerely,

Louis C. Bonasera, CPA, PFS, MST (Newburyport, MA) Email: lou@the-financial-advisors.com
Michael A. Dempsey, CFP®, EA (Andover, MA) Email: mdempsey@the-financial-advisors.com
Janet D. Choquette, EA (Andover, MA) Email: janet@the-financial-advisors.com

Taxpayer signature: ____ Date: __________________

Spouse signature: ____ Date: __________________