THE FINANCIAL ADVISORS LLC

Financial Planning & Investment Management

TFA Tax Preparation Engagement Letter

2023 Fiduciary Income Tax – US 1041 & State(s)

Thank you for choosing The Financial Advisors, LLC for your 2022 Federal and related state(s) fiduciary (trust or estate) 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***

Please sign and date below to confirm your understanding and acceptance of these terms for fiduciary tax preparation services. See 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

Fiduciary signature: ________________________________ Date: ______________

Co-Fiduciary signature: ________________________________ Date: ______________