



nelsontax.com  
503.670.8080

## Engagement Letter

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements.

We will prepare your 2020 federal and applicable state and/or local income tax returns from information which you will furnish to us. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. We will furnish you with questionnaires and worksheets to guide you in gathering the necessary information. Your use of such forms will assist in keeping the fee to a minimum.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, cancelled checks and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them.

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations and/or irregularities, should any exist. We will render such accounting assistance as necessary for preparation of the income tax returns.

The law provides various penalties that may be imposed when taxpayers understate their tax liability. If you would like information on the amount or the circumstances of these penalties, please contact us.

Your returns may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred.

Our fee for these services will be based upon the amount of time required at standard billing rates plus out-of-pocket expenses. All invoices are due and payable upon presentation.

If the foregoing fairly sets forth your understanding, please sign the enclosed copy of this letter in the space indicated and return it to our office. However, if there are other tax returns you expect us to prepare, please inform us by noting so at the end of the return copy of this letter.

We want to express our appreciation for this opportunity to work with you.

Very truly yours,  
Nelson Company, P.C.

By: \_\_\_\_\_  
Signature

\_\_\_\_\_  
Company Name(s) (if applicable)

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date

This Return Letter signature applies to my individual tax return as well as all Companies listed above.



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## Tax Extension Information

Nelson Company, P.C. (Nelson Co.) will prepare your federal, state (if necessary) and local (if necessary) extension applications at no charge to you. Filing this extension document on your behalf does not constitute an agreement to file the actual tax return. You have the right to terminate our services at any time for any reason. Nelson Co. has the same right.

Please note that an approved extension application is merely an extension of time to file the tax returns, **this is not an extension of time to pay taxes.** All taxes are due April 15th. If you typically owe taxes or believe that you will owe taxes this year, **we highly recommend paying an estimated amount on or before 4/15 to minimize penalties.** Contact us if you need help determining the amount to pay. Please notify us if you make any payments to either the IRS or the state on or before April 15.

Nelson Co. has additional deadlines based upon the date our office receives **100% of the information** required to prepare the return. Your choice to delay submitting your information to us does not constitute an emergency on our part and we cannot guarantee a turnaround time of less than two weeks from the time that we **receive ALL of your necessary information.** You may request to have your returns expedited (completed within 1 week) for an additional fee of \$150, at minimum. We will notify you if that is possible based upon our existing workload and reduced hours. If we agree to the expedition, work will not commence until the expedition fee is received.