



Engagement Letter

We are excited to continue offering our enhanced and updated service offerings that align with our commitment to providing you with comprehensive and proactive financial support throughout the year.

Our Renewed Approach:

- **Check-Ins During the Year:** Instead of a once-a-year interaction primarily focused on tax season, we are available to check in with you mid-year. This check-in will allow us to stay updated on your financial situation, provide timely advice, and make adjustments as needed.
- **Holistic Service Offering:** Our services may include ongoing advisory services. This approach ensures a more integrated and strategic handling of your financial matters.

Your Responsibilities:

- **Information Provision:** Timely and accurate provision of all necessary documents and information remains crucial. This ensures the effectiveness of our services and the accuracy of your tax filings.
- **Record Keeping:** 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.
- **Active Participation:** We encourage your active involvement in our check-ins. Your insights are invaluable in helping us tailor our services to your specific needs.

Our Commitment:

- **Continuous Support:** We are here to assist you year-round, not just during tax season. Whether it's tax planning, advisory, or accounting support, our team is committed to your financial well-being.
- **Transparent Communication:** Expect clear and regular communication from us. We believe in keeping you informed and involved in all aspects of your financial journey.
- **Tax Return Preparation:** We will prepare your 2025 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.

Pricing:

- Our prices will reflect our comprehensive service offering, including advisory services and tax return preparation.



NELSON COMPANY	P.C.
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nelsontax.com
503.670.8080

Please review the terms and confirm your agreement by signing and returning this letter. If you have any questions or need further clarification, do not hesitate to contact us.

- 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 the 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.
- If we have not received 100% of the information required to prepare your tax returns before the deadline set in our communication with you, we will prepare your tax return extension applications at no charge to you. 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.**

We look forward to this new phase of our professional relationship and are excited about the positive impact it will have on your financial well-being.

Sincerely,

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.

PLEASE NOTE: The IRS will no longer send out physical checks, all tax refunds must be direct deposit.

☐ Please acknowledge that you have confirmed the bank account information we have from prior years OR, add your bank information below.

Bank Name: _____

Routing Number _____ Account Number _____