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1040 - INDIVIDUAL TAX RETURN ENGAGEMENT LETTER

Dear Client:

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

I will prepare your 2013 federal and requested state income tax returns, including 2014 estimated tax payments from information that you will provide to me. I will not audit or otherwise verify the data you submit, although it may be necessary to request clarification of some of the information. I may provide you with questionnaires and/or worksheets to guide you in gathering the necessary information. Your use of such forms will assist in keeping pertinent information from being overlooked.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, canceled 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 carefully review them before you sign and file them.**

My work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations or other irregularities, should any exist. However, should I find any irregularities or unusual items I will bring them to your attention. I will render such accounting and bookkeeping assistance as determined to be necessary for preparation of the income tax returns. If I discover any errors or omissions on a prior year return I will bring that to your attention.

I will use professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. Unless otherwise instructed by you, I will resolve such questions in your favor whenever possible.

The filing deadline for the tax return is April 15, 2014. In order to meet this filing deadline, the information needed to complete the return should be received in this office no later than March 31, 2014.

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 me.

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 governmental tax examination, I will be available, upon request, to represent you under a separate engagement letter for that representation.

We acknowledge that any information my firm receives from one party (husband/wife) that may impact the other party will be made known to all parties: and, for that purpose, waive the requirements of confidentiality among you and the firm.

My 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 my office. However, if there are other tax returns you expect me to prepare, such as gift and/or property, please inform me by noting so just below your signature at the end of the returned copy of this letter.

I want to express my appreciation for this opportunity to work with you.

Very truly yours,

Accepted by: _____
Date

Accepted by: _____
Date

Additional Comments:

Additional Comments: _____

