

**ENGAGEMENT LETTER**  
**2011 Tax Season**  
**\*\*\*PLEASE READ THIS ENTIRE DOCUMENT\*\*\***

Dear Client:

We appreciate the opportunity of working with you and advising you regarding your income tax. To ensure a complete understanding between us, we are setting forth the pertinent information about the services which we will provide for you. **It is important that you read, sign and return the last page to us with your tax documents. If we do not have a signed engagement letter from you, the preparation of your tax return will be delayed.**

J. Edgar Group, PLLC, will prepare your federal and state (if applicable) individual income tax returns for the tax year ending 2011 from information which you furnish to us. We will make no audit or other verification of the data you submit, although we may need to ask you for clarification of some information. A 2011 Tax Checklist is available on our website, [www.jedgarcpa.com](http://www.jedgarcpa.com) or call the office and we can send one via snail mail or fax you a copy to help gather necessary information to complete the preparation of the tax return.

**Fees**

Fees vary based on the time required to complete an accurate filing. Times will vary based on the technical difficulty of your return as well as the organization of your information. **We recommend a ½ hour meeting or conference call with a tax professional, as this is a cost effective way to insure all your information is complete and your questions are answered.**

**Payment**

**Payment for returns is due upon completion, or before e-filing return(s).** Any invoice past due 30 days will be charged interest at 1.5 % per month. Invoices past due over 60 days may be sent to a collection agency. We no longer accept credit or debit card payments. **If you need a payment plan, please call or ask before we start processing.**

**E-File/Refunds/Extensions**

New law mandates preparers to e-file all returns. Clients may choose to **opt out of e-filing** and file a paper copy return. You may opt to receive a paper check but this will take longer. E-filed refunds via direct deposit into your bank account **may take as long as three weeks** from the date of acknowledgement by the IRS (usually 24 hours from e-filing). **If you want to check on your refund status, please go to [www.irs.gov](http://www.irs.gov) and look for “where’s my refund”.**

If you owe a tax liability you may authorize a direct electronic withdrawal of funds, or send a check by mail with a coupon provided with your tax return instructions. More payment option information can be found at [www.irs.gov](http://www.irs.gov).

If you request an extension of time to file your federal and/or state income tax return, we will assist in the preparation of extension(s). **An extension (of time to file) is not an extension of time to pay.** All tax liabilities are due no later than April 17, 2012.

**In order to avoid an extension we must receive all your information no later than March 28<sup>th</sup>.**

If your return is placed on **April extension**, we must receive all information to complete your return **no later than June 30<sup>th</sup>**. **If not, we may be unable to finalize your return for the October deadline.**

It is your responsibility to provide all the information for preparation of complete and accurate returns. You should retain all documents, cancelled checks, mileage logs and other data (at least 7 years) that forms the basis of income and deductions. These may be necessary to prove the accuracy and completeness of returns to a taxing authority. **You have the final responsibility for income tax returns and, therefore, you should review them carefully before you sign and file them.**

**The IRS audit procedures** will almost always include questions on bartering transactions. Additionally, evidence for deductions that require strict documentation such as travel and entertainment expenses, and also expenses for business usage of autos (i.e. mileage logs). We rely on your representations that we have been informed of all bartering transactions and that you understand and have compiled the documentation requirements for your deductions. If you have questions please ask.

Returns may be selected for examination by taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. **If an examination occurs, we will represent you if you so desire; however, these additional services are not included in our fee for preparation of your return and we will render additional invoices for the time incurred.**

Any further question, please don't hesitate to ask. Please keep this letter with your files.

## 2011 Engagement Letter Signature Page

If the foregoing is in accordance with your understanding, and you have reviewed our **Privacy Policy** (On our website [www.jedgarcpa.com](http://www.jedgarcpa.com) or available at the office or via fax) please sign below in the spaces provided and return to us with your tax information.

Sincerely,

Joanne L. Edgar, CPA  
Managing Partner

Peter F. Pike, CPA  
Partner, CFO Services

Acknowledged:

\_\_\_\_\_  
**Taxpayer (Please Print)**

\_\_\_\_\_  
**Taxpayer Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Spouse/Partner Taxpayer (Please Print)**

\_\_\_\_\_  
**Spouse/Partner Taxpayer Signature**

\_\_\_\_\_  
**Date**

**PLEASE RETURN THIS SIGNED FORM TO OUR OFFICE VIA APPOINTMENT, MAIL OR EMAIL.**