

Texas Tax Angels & Bookkeeping, LLC  
1600 W. Stan Schlueter Loop  
Killeen, Tx 76549

Tax Year: 2025  
Taxpayer: \_\_\_\_\_  
Spouse: \_\_\_\_\_

## **ENGAGEMENT LETTER FOR TAX PREPARATION: FORM 1040**

Dear Client:

This letter is to confirm and specify the terms of our agreement 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 tax returns are prepared to confirm the following arrangements.

### Scope of and Limitations on Services Provided:

Our firm will prepare your:

- ❖ \_\_\_\_\_ 2025 Form 1040 with all required schedules
- ❖ \_\_\_\_\_ 2025 State tax return (if applicable)

This engagement does not include any services not specifically listed above and does not include a duty to update any work product once delivered to the client. **We do not offer same day service.**

We are not engaged to detect fraud, embezzlement, or any other wrongdoing. We will prepare any tax-related documents based on the information you give us. It is your responsibility to provide information that is correct. We rely upon you to ensure that such information is authentic and accurate. Preparing a tax-related document according to governing professional standards provides no assurance that the information is accurate or properly recorded. 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.

We assume no managerial capacity for you through this engagement. For example, we do not act as your director, financial officer or controller and we incur no responsibility or liability for managerial decisions. You have the final responsibility for the income tax return(s) and, therefore, you should review them carefully before you sign them.

***An extension is an extension to file, NOT an extension to pay.*** Penalties and interest will accrue on any tax balance beginning April 16, 2026. Due to missing information or the date your data is received, an extension to file may be required. If you believe you will have a tax due balance, we strongly suggest you send a tax payment with your extension. Please notify us if you will be sending in a payment or if a state extension is required.

**We no longer file an automatic extension for you. You MUST request an extension be filed on your behalf. You MUST contact us AND provide us with your necessary information and extension payment NO LATER THAN APRIL 1, 2026. The \$50 fee MUST be paid in advance of the extension submission.**

We agree that your return(s) 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, Protection Plus will provide comprehensive assistance to ensure your matter is resolved. This service is included with your tax preparation fee: brochure will be attached to your 2025 tax return copy.

*Timeframe for Providing Services:*

We will complete our engagement as soon as possible; however, we cannot guarantee a completion date. We anticipate completing the engagement within 21 business days of receiving ALL of your complete and accurate information. We will not begin any tax preparation until we have received your completed 2025 Tax Organizer, signed 2025 Agreement letter and your retainer fee.

***In order to complete your tax return by April 15, 2026, you MUST provide us with your complete information NO LATER THAN MARCH 16, 2026.***

*Tax preparation fees:*

Our tax preparation fees will be changing to accommodate increases in the costs of delivering our services. Single taxpayers, with no dependents, will have a \$100 retainer. All others will have a \$200 retainer. The retainer fee must be paid before tax preparation services begin. It is **NON-REFUNDABLE** and will be deducted from the final tax preparation invoice.

***Before we can electronically file your tax return with the IRS or release the tax return to you, your invoice must be paid in full and your forms must be signed and dated.***

*Professional Standards Applicable to Services Provided:*

We provide all tax-related services in accordance with Title 31, Code of Federal Regulations, Subtitle A, Part 10 (Treasury Department Circular No. 230).

*Client Responsibilities:*

You are responsible for providing us with accurate information and source documents. Upon your request, we can provide a “tax organizer” for you to facilitate the gathering of necessary documents and information for use in the preparation of tax returns, if applicable. You agree to cooperate in responding to the tax organizer and make available to us complete and accurate records. If we determine that the information provided is incorrect, incomplete, or inconsistent with our knowledge, we must make further inquiries to satisfy our due diligence requirements.

*Dispute Resolution:*

If any dispute arises between the parties, from our professional services, or under this engagement letter, the parties agree – as a condition precedent to filing suit – to first submit the dispute to non-binding mediation administered by an agreed-upon third party. At the mediation, the parties agree to

make a good faith attempt to settle the dispute. We will pay half the cost of the mediation, and the claimants shall pay the other half.

*Our Firm's Right to Withdraw from Engagement:*

We reserve the right to withdraw from this engagement. If we do withdraw from this engagement, we will send you a status update and we will then have no further obligation to complete the professional services.

We will terminate this engagement if any of the following occur:

- A conflict of interest occurs that cannot be waived.
- You fail to respond to email or telephone communication for more than 15 business days.
- A required payment is more than 15 business days late.
- You make an intentional misrepresentation to us during this engagement.

**Upon our withdraw from this engagement, you agree to pay any outstanding balance(s).**

*Liability and Indemnification:*

In no event shall we be liable, whether a claim is in tort, contract or otherwise, for any consequential, indirect, lost profit or similar damages relating to our services provided under this engagement letter, except to the extent finally determined to have resulted from our willful misconduct or fraudulent behavior relating to such services.

Even where damages may result in part from our perceived negligence, you agree to indemnify us and our personnel against all liability, claims, demands or damages resulting in whole or in part from any negligent or intentional misrepresentations made by you, your officers, directors or employees.

*Data Security & Client Confidentiality:*

We store information electronically and will communicate with you and others via email and through your client portal (Liscio). We will take appropriate and customary measures to ensure data security and client confidentiality. However, as electronic information can be stolen and emails intercepted or otherwise disclosed by third parties, we cannot guarantee that information will be absolutely secure. In that regard, you agree that we shall have no liability for any claim, loss, or damage arising from the disclosure of confidential or proprietary information.

***Please DO NOT EMAIL sensitive documents or information directly to us. Please use your Liscio client portal to email, text or scan any document to us securely.***

*IRS Balance due*

If you have a tax balance due to the IRS or to a state government, please note that we **DO NOT** pay any tax owed on your behalf. Instructions for making online payments will be provided in your client letter as part of your completed tax return. You are responsible for processing your own payment for any tax amount due to the IRS or state.

Severability:

If any part of this agreement should be held void or invalid, the remaining provisions shall remain in full force and effect.

Client Copy of Tax Return(s):

We will provide a client copy of your 2025 tax return(s) to you. If you choose to have a paper copy of your tax return mailed to you, we will charge you for postage.

If you prefer an electronic copy of your tax return, we will upload it to your secure client portal, Liscio, at the time of completion at no extra cost.

Electronic Signatures:

Upon completion of your 2025 tax return, you can request to sign your documents electronically via our client portal. Per IRS guidelines, this signature must be KBA certified and requires you to prove your identity. The non-refundable fee is \$5 per electronic signature and will be added to your invoice.

**For security reasons, we will NOT email it to you.**

**You will be charged a separate fee for all additional electronic and/or paper copies of your tax return you request.**

**We appreciate the opportunity to serve you and value you as a client.** By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities, and that you understand our responsibilities in providing tax services as explained above.

Sincerely,

Tanya Perez, EA

Texas Tax Angels & Bookkeeping LLC

\_\_\_\_\_  
Taxpayer's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Signature

\_\_\_\_\_  
Date