



Terms of Tax Preparation Engagement

We provide this letter to ensure an understanding of the terms of our engagement and the nature and limitations of our services for the 2021 tax filing season. In order to ensure this understanding, we ask all clients to confirm these arrangements.

We will prepare your annual federal and Wisconsin income tax returns and supporting schedules, if necessary, from information that you will provide to us. You are responsible for informing us if you have tax-filing obligations in another state. We will not audit or verify this data, although we may ask you to clarify some of the information. We will furnish you with questionnaires and/or worksheets to guide you in gathering information. Your use of forms provided will assist in keeping important information from being overlooked. Unless otherwise agreed to in writing, this engagement does not include tax planning advice or additional services not included in this letter, and the returns that we prepare are not intended for use for any other purpose. If any bookkeeping services are needed to clean up any data, we will bill separately for this service.

It is your responsibility to provide all information and relevant facts that are **required for the preparation of complete and accurate returns.** You are certifying that the information you provide to us can be substantiated by appropriate documentation, and that it is true, correct, and complete to the best of your knowledge. You should retain all documents, canceled checks and other data that are used in completing the return. These may be necessary to prove the accuracy and completeness of the returns upon examination. You have final responsibility for your income tax returns and, therefore, you should review them carefully before you sign them.

To timely file your tax returns, we need all required information no later than **Monday, March 29, 2021**. You may be required to request an extension if we do not receive all required information by the above date. Please note that an extension of time is an extension of time to file the return, and not an extension to pay taxes due. We can assist you in determining the amount to pay with a request for an extension.

Our tax preparation procedures cannot be relied upon to disclose errors, irregularities or illegal acts, including fraud that may exist. However, we will inform you of any material errors that come to our attention.

Your returns could be selected for review by the IRS or other 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. We will provide you with a separate engagement letter for that representation and fees and expenses will be invoiced in accordance with the terms of that engagement letter.

Our fee for the tax return preparation is based on the complexity of the work, our professional time, as well as out-of-pocket expenses. The invoice will be presented to you with the tax return.

Payment is due upon presentation of the tax return.

We may terminate our representation of you if you fail to pay our statements when due, if you insist we pursue objectives that we consider imprudent, unprofessional, or unethical; or if we feel further representation is not warranted for personal reasons. Regardless of the reason for termination, you are obligated to pay for services provided and costs incurred through the date of termination.

Please sign this letter and return it to us to signify your acceptance of these terms. Thank you for allowing us to assist you and for your anticipated understanding of the need for this letter. We will keep a copy of this letter in our file.

Kollath & Associates, CPA LLC

AGREED TO AND ACCEPTED BY TAXPAYER AND SPOUSE (if applicable):

Taxpayer Signature

Date

Spouse Signature

Date

Print Name

Print Name

Brookfield:
675 Brookfield Road Ste. 201
Brookfield, WI 53045
Phone: 414-751-6847
Fax: 866-486-4261

Madison:
6200 Mineral Point Road Ste. 100
Madison, WI 53705
Phone: 608-824-3002
Fax: 866-486-4261

Prairie du Sac:
421 Water Street, Ste. 111
Prairie du Sac, WI 53578
Phone: 608-644-0206
Fax: 608-643-3467

www.kollathcpa.com
www.sustainablehr.net
www.organicpayroll.com