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Gable Tax Service

2023 General Engagement Letter for Individual Tax Return Preparation

This letter is to inform you, the taxpayer and our client, of the services we will provide you, and the responsibilities you have for preparation of your tax return.

Services We Will Provide

- We will prepare your 2023 federal and state tax returns based on information you provide. State returns will be prepared only for states for which you provide current information.
- This engagement does not include any audit, examination, or verification of your books and records, or any other information provided by you. In the event your return is audited, you will be responsible for verifying the items reported.
- The tax return preparation fee does not include bookkeeping. Additional fees apply for these services.
- Assisting with your compliance with the Corporate Transparency Act, including beneficial ownership information reporting, is not within the scope of this engagement.
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities. Preparation fees do cover limited assistance and consultation during the year.
- The engagement to prepare your 2023 tax returns terminates upon delivery of your completed returns and original documents to you. Please store your supporting documents and copies of your tax returns in a secure place for at least seven years.

Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You affirm that you provided us with all information regarding gifts made and received, virtual currency or other digital assets, sale or purchase of property, and foreign bank accounts and/or other foreign property. You understand that compliance with the Corporate Transparency Act is your responsibility and is not included in this engagement.
- You must be able to provide written records of all items included on your return if audited by either the IRS or the state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the return carefully before signing to make sure the information is correct.
- If you terminate this engagement before completion, you agree to pay a fee for work completed.
- You should keep a copy of your tax return and any related tax documents. You may be charged a fee if you request a copy in the future.

Signatures. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities and that you understand our responsibilities in preparing your tax returns as explained above. For a joint return, both taxpayers must sign.

Taxpayer

Spouse

Date

Privacy Policy. The nature of our work requires us to collect certain nonpublic personal information about you from various sources. We collect financial and personal information from applications, organizers, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to any third party without your express permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access. Please contact us with any questions regarding our privacy policy.