



Engagement Letter- Income Tax Return (Personal & Business)

Dear Valued Client:

Thank you for selecting **CR Taxes & Accounting LLC** to deliver comprehensive taxation services throughout the year. Our firm is dedicated to offering exceptional tax preparation and outstanding service. This engagement letter sets forth the terms and conditions governing our taxation services and defines our respective responsibilities.

We will prepare your federal income tax return, along with any necessary state returns, based on the information you provide. Throughout this process, we will exercise careful diligence regarding the data you submit, including seeking clarification when needed. However, our work does not involve searching for procedural errors, defalcations, or other irregularities. The only accounting or analysis we will conduct is due diligence mandated by the Internal Revenue Service and State Taxing Authorities for preparing your income tax return(s). When faced with unclear aspects of tax law or differing interpretations, we will use our professional judgment and always aim to resolve these issues in your favor whenever possible.

We will provide a comprehensive checklist and organizer to assist you in collecting all necessary information. Kindly submit the completed checklist with all required details to ensure prompt preparation of your return(s). Please confirm that the information you provide is accurate and complete to the best of your knowledge. Additionally, you are responsible for verifying that all income and expense items **reported on** your return(s) are supported by adequate documentation and receipts. It is advisable to retain all records, including canceled checks and other documents, which substantiate your reported income and deductions. _____ **(Initial);**
_____ **(Joint Initial)**



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Client Portal

How to access→ www.crtaxlady.com →Client Portal Login

You acknowledge that you will utilize the client portal to upload, download, and communicate as needed. The client portal employs encryption to enhance your security and mitigate risks associated with internet email accounts, such as identity theft. Please refrain from unsubscribing from the Client Portal. Kindly monitor your email for communications from the Portal. For your protection, any links provided in portal communications will expire within 24 hours. The Portal is used to share vital information, including tax law updates and office closures. _____ (Initial); _____ (Joint Initial)

My Tax Office/TaxProLink/Tax Portal /Tax Return File Copy (TR FC)

The encrypted tax portal is designed to securely send your tax return documents for signing and to provide you with a copy of your signed, completed tax return (as required by law). Your signature pages, invoice, and tax return copy have been emailed to you through **TaxProLink/MyTaxOffice**. Please click the link, register using your email address, and set up a username. Note that the link expires in 24 hours—a new link will be sent if required.

Once your documents are signed and complete, please remember to download your copy to your computer. A TR FC will be available in your portal files. If you need extra copies, a fee of **\$50** will apply. _____ (Initial);
_____ (Joint Initial)



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Tax Return Accuracy

You bear responsibility for the accuracy of your tax return(s) and are encouraged to thoroughly review all returns prior to submission. If applicable, mailing your tax return remains your responsibility; however, for your convenience, we offer this service for an additional fee. Please note that your returns are subject to review by taxing authorities. Receiving a letter (notice) from the IRS or being selected for audit does not necessarily indicate an issue with your return. To best protect your interests, we recommend contacting our office promptly and uploading any correspondence from the Internal Revenue Service or other taxing authorities to your portal upon receipt. **TIMELY ACTION IS CRITICAL**, as delays may result in increased *penalties, interest, or processing delays.* Our team is available to assist or represent you at the current rate of \$250 per hour. _____ (Initial); _____ (Joint Initial)

If an error on your return arises from incorrect information provided by you, you are responsible for any resulting additional taxes, interest, and IRS-imposed penalties. Should an error occur due to our error and or omission—excluding errors related to incorrect information you supplied, we will assume responsibility for payment of penalties only. Interest or additional tax due will not be covered, as such amounts would have been payable if the return had been prepared accurately. _____ (Initial); _____ (Joint Initial)

IRS Representation

The hourly rate for representation is \$250. This is document retrieval from any taxing authority, responding to notices of any taxing authority, tax assessment abatements and paper processing of any kind. _____ (Initial);
____ (Joint Initial)



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Tax Preparation & Late Fees

Please note, all fees are due when services are complete and the tax return is presented for your signature. Fees will be computed according to our current fee schedule, plus any out-of-pocket expenses. Organizing records and compiling figures for entry on the tax return will be billed at our consulting rate of **\$250**/ hour. Such charges are billed in addition to the fee schedule. **IF YOUR REFUND IS OFFSET** due to IRS tax debt and collections, **YOUR PREPARATORY FEES ARE STILL DUE AND WILL BE RECOVERED FROM A THIRD-PARTY COLLECTIONS AGENCY.** We reserve the right to ask for a retainer fee (\$250/min) to be paid in advance by new clients and any client with whom we have experienced payment problems. **TO THE EXTENT PERMITTED BY STATE LAW, LATE FEES AND INTEREST CHARGES MAY BE ADDED TO ALL ACCOUNTS NOT PAID WITHIN THIRTY (30) DAYS OF COMPLETION OF SERVICE.**

If further collection efforts are required, you will be billed for any court fees **CR Taxes & Accounting, LLC**, incurred during the collection efforts. _____ (Initial); _____ (Joint Initial)

Accepted Forms of Payment for Services Provided

There are several payment options: PayPal, CashApp, Venmo, Credit Card, Check, Cash, **Zelle (preferred method)** and deducted from your refund with Refund Advantage Bank (bank fees apply). If paying with PayPal, CashApp, Venmo, Credit Card, you will be charged a processing fee of 4%. _____ (Initial); _____ (Joint Initial)



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Tax Return File Copy (TR FC)

A soft copy (PDF) of your tax return will be provided to you via the portal or the tax app for your files. Please download to your files. Additional copies no matter which form (paper or PDF) are \$50.00. _____ (Initial);
____ (Joint Initial)

Extension Request

Please contact us if you would like to request an extension to file your taxes. An extension will be filed automatically if tax information is received after March 31st. Please note that an extension to file is not an extension to pay. You will be assessed penalties and interest if you have unpaid taxes due April 15th. **WE DO NOT AUTOMATICALLY FILE EXTENSIONS.** _____(Initial); _____Joint Initial)

Tax Refunds

Please contact the IRS for any delays with your refund @ 1.800.866.1040. You can locate refund information at www.IRS.Gov or the **IRS2Go app**, “Where is my Refund. You can also track your refund from my website www.crtaxlady.com located at the bottom of the page for both your federal and state refund. **YOU WILL BE BILLED OUR HOURLY RATE IF WE INQUIRE ON YOUR BEHALF FOR REFUND DELAYS IF IT IS NOT A PROCESSING ERROR OF CR TAXES & ACCOUNTING, LLC.** _____(Initial)
: _____Joint Initial)



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Office Closure Date

PLEASE NOTE THE OFFICE IS CLOSED ON ALL HOLIDAYS, & SUNDAYS. Please refer to www.crtaxlady.com for office hours. Any needed office closings will be communicated via the Client Portal Newsletters /Client Portal _____(Initial); _____Joint Initial)

Privacy Statement

We maintain a file of tax returns as required by law which we have prepared and/or electronically filed. We do not share your information with anyone, except as required by law, without your written consent.
_____ (Initial); _____Joint Initial)

Affirmation

To affirm that this letter correctly summarizes your understanding of the arrangements for taxation services provided, please sign, and return this letter and or bring it with you to your tax appointment. A completed copy will be returned electronically to your email for your records. _____(Initial); _____Joint Initial)

We appreciate your confidence in us; please contact us with any questions or concerns that you may have.



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Sincerely,

CR Taxes & Accounting, LLC
www.crtaxlady.com (Website)
info@crtaxlady.com (Email)
1.866.768.2333 (Fax)

(Spouses must sign for joint filing)

Taxpayer Name

Spouse Name

Taxpayer Signature

Spouse Signature

Date

CONSENT TO DISCLOSURE OF TAX RETURN INFORMATION

For the purposes of this consent form, "we," "us," and "our" mean

(Tax Professional)

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage in our tax preparation services. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

You have indicated that you are interested in receiving an Electronic Disbursement Service and/or Loan (or collectively, "Products or Services") from Pathward, National Association. In order to provide you with the opportunity to apply for one of these Products or Services, we must disclose all of your 2025 tax return information necessary for evaluating the request to Pathward. If you request a more limited disclosure of tax return information, you will not be eligible to submit an application request for these Products or Services. If you would like us to disclose your 2025 tax return information for this purpose, please sign and date your consent to the disclosure of your tax return information.

By signing below, you authorize us to disclose to Pathward all of your 2025 tax return information necessary for the evaluation and processing of your request for a Product or Service. You understand that if you are unwilling to authorize the disclosure and sharing of your tax return information with Pathward, you will not be able to obtain a Product or Service, but you may still choose to have your tax return prepared and filed by us for a fee.

Printed Name of Taxpayer: _____

Taxpayer Signature: _____ Date: _____

Printed Name of Joint Taxpayer (if applicable): _____

Joint Taxpayer Signature (if applicable): _____ Date: _____

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by e-mail at complaints@tigta.treas.gov.

CONSENT TO USE OF TAX RETURN INFORMATION

For the purposes of this consent form, "we," "us," and "our" mean

(Tax Professional)

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use your tax return information for purposes other than the preparation and filing of your tax return without your consent.

You are not required to complete this form to engage in our tax return preparation services. If we obtain your signature on this form by conditioning our tax preparation services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

If you do not consent, you may still have your tax return prepared and electronically filed by us for a fee.

For your convenience, we have entered into an arrangement with third parties to provide qualifying taxpayers with the opportunity to apply for an Electronic Refund Disbursement Service and/or Loan product. To determine whether these products may be available to you, we will need to use your tax return information in order to calculate the amount of your anticipated refund.

If you would like us to use your tax return information to determine whether these products may be available to you while we are preparing your return, please sign and date this consent to the use of your tax return information.

By signing below, you authorize us to use the information you provide to us during the preparation of your 2025 tax return to determine whether to present you with the opportunity to apply for these products and services.

Printed Name of Taxpayer: _____

Taxpayer Signature: _____ Date: _____

Printed Name of Joint Taxpayer (if applicable): _____

Joint Taxpayer Signature (if applicable): _____ Date: _____

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by e-mail at complaints@tigta.treas.gov.