



On Point Tax & Accounting, LLC Engagement Letter

Thank you for choosing On Point Tax & Accounting, LLC to assist you with your 2023 taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

Based upon the information you furnish to us, we will prepare your Federal, State, and local (if applicable) income tax returns for 2023. We will not audit or verify the data you submit to us, although we may ask you for clarification when necessary. All the information you submit to us will, to the best of your knowledge, be correct and complete and include all information necessary for the completion of your tax return.

You, as the taxpayer(s), have the final responsibility for your income tax returns. Please review them carefully before you sign the authorization forms for electronic filing. Your returns are subject to review by the taxing authorities. Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

Our fee structure is a form-based pricing model. Our base fee for individual tax return preparation is \$175. The base fee for student returns is \$50. Additional fees will apply depending on the forms and schedules needed to complete your return as well as the complexity of your personal tax situation. We offer a discount from our base fee for low-income seniors over 70, military and first responders.

We will return your original records to you at the end of this engagement. You should securely store these records for seven years along with all supporting documents as these items may later be needed to prove accuracy and completeness of a return. We will retain copies of your records and our work papers for your engagement for three years, after which these documents will be destroyed.

Our engagement to prepare your 2023 tax returns will conclude with the delivery of the completed returns to you and our subsequent electronic submittal of your tax return.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign this and include it when providing your tax return documentation.

We appreciate your confidence in us.

Gwen James, CMA, EA

Accepted by:

Taxpayer Signature

Spouse Signature (if filing jointly)

Taxpayer Name (Print)

Spouse Name (Print)

Date