

**Diaz Koontz Business Services, Inc.**  
**7 S New Warrington Rd**  
**Pensacola, FL 32507-1065**  
**850-458-9210**

Taxpayer's Name : \_\_\_\_\_

Spouse's Name : \_\_\_\_\_

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

**We will prepare your \_\_\_\_\_ federal and/or state income tax returns from information which you will furnish to us.** We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. 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 must receive all source documents necessary to prepare your tax returns prior to \_\_\_\_\_ to ensure that the returns will be completed and in your hands by the due date.

**It is your responsibility to provide all the information required for the preparation of complete and accurate returns.** You should retain all the documents, cancelled checks and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. **You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them.**

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations and/or irregularities, should any exist. We will render such accounting and bookkeeping assistance as determined to be necessary for preparation of the income tax returns.

We will use our best judgment consistent with the Internal Revenue Code, regulations, and interpretations promulgated to prepare your tax return. However, in rare cases where the tax law may be unclear, we will inform you of our position and discuss the issues with you. If federal or state taxing authorities later contest the position we have taken, there may be an assessment of additional tax, interest & penalties. In such cases, we will accept responsibility for any penalties caused directly by our position on the issue, but, we will assume no liability for any additional tax, and/or interest.

The law provides various penalties that may be imposed when taxpayers understate their tax liability. If you would like information on the amount or the circumstances of these penalties, please contact us.

Your returns 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, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred. Our fee for these services will be based upon the amount of time required at standard billing rates plus out-of-pocket expenses. All invoices are

due and payable upon presentation.

**Tax returns may NOT be released until payment has been received by our firm and WILL ONLY be released to the taxpayer or their authorized representative.** Our fee for these services will be based upon the amount of time required at standard billing rates plus out-of-pocket expenses. **All invoices are due and payable upon presentation.** Fees not paid at the time tax return is picked up by the client are subject to an additional \$20 administrative & billing fee, plus, 1.5% per month late payment charges (18% APR). Client is also responsible for all expenses incurred by Díaz Koontz Business Services, Inc. to collect these fees, including legal fees.

Under the present law, we are unable to provide copies of your tax returns to third parties unless you provide us with prior written consent to do so. Specific wording of the written consent is set forth by law-- **Absolutely no copies can be released without this written consent form.**

If the foregoing fairly sets forth your understanding, please sign the enclosed copy of this letter in the space indicated and return it to our office. However, if there are other tax returns you expect us to prepare, please inform us by noting so at the end of the return copy of this letter.

We want to express our appreciation for this opportunity to work with you.

Very truly yours,

Diaz Koontz Business Services, Inc.

Accepted By: \_\_\_\_\_

Printed name(s) \_\_\_\_\_

Date: \_\_\_\_\_

**Important Note:**

**We are required by law to electronically file federal income tax returns for individuals, trusts, and estates. Taxpayers can elect not to have their returns filed electronically. If you choose to file your income tax return on paper, please sign the following statement:**

My tax return preparer, Diaz Koontz Business Services, Inc., has informed me that they may be required to electronically file my \_\_\_\_\_ income tax return ( Form 1040A, Forms 1040, Form 1040EZ or Form 1041) if they file it with the IRS on my behalf. I do not want to file my return electronically and choose to file my return on paper forms. My preparer will not file my paper return with the IRS. I will file my paper return with the IRS myself. I was not influenced by Diaz Koontz Business Services, Inc. or any other member of this firm to sign this statement.

\_\_\_\_\_  
Taxpayer Signature

\_\_\_\_\_  
Spouse Signature

Date: \_\_\_\_\_