Engagement Agreement – 2023 Tax Season

This letter is to confirm and specify the terms of LMM & Associates, Inc. ("LMM") engagement with you and to clarify the nature and extent of the services LMM will provide. To ensure an understanding of our mutual responsibilities, LMM requires all clients for whom tax returns are prepared to confirm the following arrangements.

LMM will prepare your **2022** Federal and requested State income tax returns from information that you will furnish to LMM. 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. LMM will furnish you with a Tax Organizer via **Smart Vault** to guide you in gathering the necessary information.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all documents, canceled checks and other data that form the basis of income and deductions. You have the final responsibility for the income tax returns, therefore you should review them carefully before signing. Your returns may be selected for review by the taxing authorities. In the event of such examination, we will be available upon request to represent you and will render additional invoices for the time and expenses. Our fee for these services will be based upon the amount of time required at standard billing rates plus out of pocket expenses.

All of your original records will be returned to you at the end of this engagement. Keep original records in a secure storage for 7 years. We will keep copies of the tax returns on file for 3 years, as required by law.

____ Once tax returns are completed and you have been notified, e-file forms and payment must be received within 7 days. A "Holding" fee of $25 per week will be charged for every week thereafter.

____ A $100 deposit (non-refundable) will be charged to file an extension. Upon completion of the returns, the tax preparation fee will be reduced by $100.

____ To follow IRS regulations, acknowledge that the following two items MUST be received prior to filing your returns:

➔ E-File Forms must be signed / returned AND payment must be received

____ If you wish to have your completed return and original records mailed to you, a $10 fee will apply

Authorization to use Tax Return to Provide Tax Related Services

Unless authorized, we cannot use, without your consent, your tax return information for anything other than preparing your returns. This firm provides tax services beyond tax preparation. By signing below, you consent that we may use your tax returns to assist in tax planning. This includes tax advice relating to marriage, divorce, college expenses, retirement planning, investments, sale or exchange of investments/real estate, required minimum distributions, and other tax related issues. I understand that beyond the specifics of services I request, no tax return information will be disclosed to any other persons. This is valid for one year unless otherwise noted.

_____	_____
Taxpayer Signature **Date**	**Spouse Signature** **Date**
_____	_____
Preferred Email	**Preferred Email**
_____	_____
Phone	**Phone**