

INDIVIDUAL TAX ENGAGEMENT LETTER
2023 Tax Season
*****PLEASE READ THIS ENTIRE DOCUMENT*****

Dear Client:

We appreciate the opportunity of working with you and advising you regarding your income tax. To ensure a complete understanding between us, we are setting forth the pertinent information about the services which we will provide for you. **It is important that you read, sign, and return the last page to us with your tax documents. If we do not have a signed engagement letter from you, the preparation of your tax return will be delayed.**

Lekas, Edgar & Company, LLC will prepare your federal and state (if applicable) individual income tax returns for the tax year ending 2023 from information which you furnish to us. We will make no audit or other verification of the data you submit, although we may need to ask you for clarification of some information.

If you have not set up your portal, and want to do so, please call or email info@lekasedgar.com. The portal loading of tax documents and tax returns in a confidential and secure manner.

E-File/Refunds/Extensions

Form 8879 (Authorization for E-file) must be signed and returned prior to our e-filing returns. We can accept fax, email, and uploads to the portal.

Clients may choose to **opt out of e-filing** and file a paper copy return. You may opt to receive a paper check, but it may take longer to receive your refund. **If you want to inquire on your refund status, please go to www.irs.gov and click on "Refund Status" follow the site instructions. We do not and will not ever take your invoice amount due to us directly out your refund.**

If you owe a tax liability you may authorize a direct electronic withdrawal of funds or send a check by mail with a coupon provided with your tax return instructions. More payment options can be found at www.irs.gov.

If you request an extension of time to file your federal and/or state income tax return, we will assist in the preparation of extension(s). **An extension (of time to file) is not an extension of time to pay.** All tax liabilities are due no later than April 15, 2024. **We must receive sufficient information from which to prepare your returns within a reasonable period of time prior to the filing deadline.**

We are unable to guarantee your return will be completed prior to the filing deadline this year and are not providing a deadline to avoid extensions, this is due to the large number of returns we process. Not to worry though, we will file an extension for you which will extend your deadline for another 6 months. We do not charge any extra fees for an extension, but if you think you owe money, we suggest making a payment prior to 4/15. To determine if a payment is needed, or accelerating processing of your return please get your documents to us by the beginning of February.

If your return is placed on April extension, we must receive all information to complete your return by the end of July. If not, we may be unable to finalize your return for the October deadline.

It is your responsibility to provide all the information for preparation of complete and accurate returns. You should retain all documents, cancelled checks, mileage logs and other data (at least 7 years) that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of returns to a taxing authority. **You have the final responsibility for income tax returns and, therefore, you should review them carefully before you sign and file them.**

Payment

Payment for returns is due upon completion, or before e-filing return(s). Any invoice past due 30 days will be charged interest at 1.5 % per month. Invoices past due over 60 days may be sent to a collection agency. We do not accept credit or debit card payments, but we can provide an invoice with a link to pay us electronically via ACH. **If you need a payment plan, or an estimate of your fees, please call or ask before we start processing.**

The IRS audit procedures will almost always include questions on bartering transactions. Additionally, evidence for deductions that require strict documentation such as travel and entertainment expenses, and expenses for business usage of autos (i.e. mileage logs) will be requested. We rely on your representations that we have been informed of all bartering transactions and that you understand and have compiled the documentation requirements for your deductions. If you have questions, please ask.

Returns may be selected for examination by taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. **If an examination occurs, we will represent you if you so desire; however, these additional services are not included in our fee for preparation of your return and we will render additional invoices for the time incurred.**

Any further question, please don't hesitate to ask. Please keep this letter with your files.

2023 Individual Tax Engagement Letter Signature Page

If the foregoing is in accordance with your understanding please sign below in the spaces provided and return to us with your tax information.

Sincerely,

Lekas, Edgar & Company, LLC

Acknowledged:

Taxpayer (Please Print)

Taxpayer Signature

Date

Spouse/Partner Taxpayer (Please Print)

Spouse/Partner Taxpayer Signature

Date

PLEASE RETURN THIS SIGNED FORM TO OUR OFFICE WITH YOUR TAX DOCUMENTS

RETURNS CANNOT BE PROCESSED WITHOUT THIS SIGNED FORM ON FILE