

# Terri L Whittington CPA

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Phone: (336)668-3588 | Fax:

Subject: Preparation of Your 2017 Tax Returns

Thank you for choosing Terri L Whittington CPA to assist you with your 2017 taxes. This letter confirms the terms of the engagement with you and outlines the nature and extent of the services I will provide.

I will prepare your 2017 federal and state income tax returns. I will depend on you to provide the needed information to prepare complete and accurate returns. I may ask you to clarify some items but will not audit or otherwise verify the data you submit.

I will perform accounting services only as needed to prepare your tax returns. My work will not include procedures to find defalcations or other irregularities. Accordingly, this engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. I will inform you of any material errors, fraud, or other illegal acts I discover.

Should there be instances of unclear tax law, or of potential conflicts in the interpretation of the law, I will outline the reasonable courses of action and the risks and consequences of each. I will ultimately adopt, on your behalf, the alternative you select.

Tax return preparation fees are due and payable upon presentation. All accounts not paid within thirty (30) days are subject to interest charges to the extent permitted by state law.

I will return your original records to you at the end of this engagement. Store these records, along with all supporting documents, canceled checks, etc., in a secure location in case these items are needed later to prove accuracy and completeness of a return. I retain copies of your records and our work papers for your engagement for seven years, after which these documents will be destroyed.

This engagement to prepare your 2017 tax returns will conclude with the delivery of the completed returns to you e-filing of the appropriate federal and applicable state income tax returns. If you have chosen not to e-file your returns, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, sign this letter in the space indicated and return it to me with your tax documents.

Thank you for the opportunity to be of service. If you have any questions, contact me at (336)668-3588.

Sincerely,  
Terri L Whittington CPA

(Both spouses must sign for preparation of joint returns.)

Accepted By:

\_\_\_\_\_  
Taxpayer

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse