



Client Name(s): \_\_\_\_\_

Tax Year(s): \_\_\_\_\_

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

This Engagement Letter confirms the terms under which Premier Tax Strategies ("we," "us") will provide professional tax-related services to you ("you," "client").

We will prepare your federal and applicable state and/or local income tax return(s) for the tax year(s) listed above, based solely on information you provide. Where permitted, returns will be electronically filed. If electronic filing is not available or not required, returns will be prepared for mail-in filing. This engagement applies only to the tax year(s) listed and does not include audit representation, responding to notices, tax planning, bookkeeping, payroll, or financial statement preparation unless separately agreed to in writing.

**Client Responsibilities:** You agree to provide complete, accurate, and timely information necessary for the services provided. You are responsible for maintaining documentation supporting income, deductions, credits, and other tax positions. You agree to review all completed returns or work products before filing or submission. You remain responsible for the accuracy of all filings, even if prepared by us.

**Reliance on Information:** We rely on the information you provide without independent verification and are not responsible for errors or omissions resulting from incomplete, inaccurate, or untimely information.

**Fees and Payment:** Our fees are based on the complexity of the services provided, forms required, and time involved. Fees are due prior to filing with the IRS or applicable taxing authority. Returns will not be electronically filed or released for mail-in filing until payment has been received. Additional forms, amendments, or revisions may result in additional charges.

**Extensions:** If all required information is not received by April 1, an extension of time to file may be submitted. An extension extends the time to file, not the time to pay.

**Other Jurisdictions:** We do not determine filing obligations in jurisdictions other than those you disclose. Any additional review requires a separate written agreement.

**Electronic Communication and Data Security:** We may communicate with you electronically, including by email or secure client portal. Although reasonable safeguards are used, electronic communications may be subject to interception, delivery delays, or unauthorized access.

**Record Retention:** Please keep copies of your tax returns and supporting documents for your records. We may retain copies for our files, but long-term storage or retrieval cannot be guaranteed.

**Limitation of Liability:** Our liability for any claim arising from this engagement is limited to the fees paid for services rendered.

**Termination and Entire Agreement:** Either party may terminate this engagement in writing at any time. This agreement represents the entire understanding between the parties and supersedes any prior discussions or agreements.

I certify that the information provided is true and complete to the best of my knowledge.

**TP Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Spouse Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

Katrina Gonzalez / Premier Tax Strategies: /s/ *Katrina Gonzalez*