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UBU TAX PROFESSIONALS ELITE 2023 Individual Income Tax Preparation Engagement Letter

___FL ___GA ___SC ___OTHER 47 STATES

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. The IRS imposes penalties on taxpayers and tax return preparers, for failure to observe due care in preparing income tax returns. In order to ensure an understanding of our mutual responsibilities, we ask all clients to confirm the following arrangements.

We will prepare your 2023, _____, _____ (Tax Year(s) U.S. Individual Income Tax Return(s) with all necessary supporting Forms and Schedules from the information provided by you. It is your responsibility to provide all the information required for the preparation of a complete and accurate income tax return. You represent that the information you are supplying to us is accurate and complete to the best of your knowledge and that any expenses claimed for meals, entertainment, travel, business gifts, dues and membership, vehicle usage, and/or charitable contributions are supported by records as required by law and that you have disclosed all known tax liabilities. **You are confirming that you have not withheld any information that may affect your tax situation, tax filing or tax refund. If you are unsure about an issue, we need to discuss it before you sign your income tax return.**_____

IRS guidelines require we e file **all** income tax returns we prepare. Unless you feel e filing your income tax return will do you *undue hardship*, your income tax return will be filed electronically with the IRS. Prior to you signing the Form 8879, you will be provided a complete copy of your income tax return to review.

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. You have the final responsibility for your income tax return and, therefore, you should review your return with your Preparer, as well as keep back-up information of the information provided, in the event it is ever needed.

We will use professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible. We subscribe to a program of peer review for maintenance of quality control in our office. As part of this program, your return may be reviewed by other tax preparers in our office under strict rules of confidentiality.

In all probability, you would not be audited. However, in the event you receive a letter from the IRS's AUSC on an income tax return, do not panic, as most questions can be easily cleared up by responding immediately to any IRS inquiry. We offer and recommend that you pay a fee of \$74.95 (which includes \$10.00 service fee) to have Tax Protection

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Plus added. It is an Audit Protection service which will provide assurance that if needed, a representative will handle your issue with the IRS on your behalf, and pay up to \$2,500 for any tax error, in the event of an audit. In the 2023 Tax Year, Tax Protection Plus also offers Identity Theft. Keep in mind, this is suggested, but not mandatory. If your Individual Tax Return is selected for review by taxing authorities, any proposed adjustment may be subject to rights of appeal. However, it is a benefit to our clients for UBU Tax Professionals Elite to offer this product.

We will not disclose any of your privileged information, unless required by law, without written instructions from you.

If the foregoing fairly sets forth your understanding, please sign below.

UBU Tax Professionals Elite would like to express our appreciation for your business and this opportunity to serve your tax needs.

I AUTHORIZE UBU TAX PROFESSIONALS ELITE TO
PREPARE MY _____ TAX RETURN, AND
ACKNOWLEDGE AND AGREE :

TAXPAYER

LAST FOUR OF SOCIAL SECURITY NO. _____

DATED _____

TAXPAYER SPOUSE
(If Applicable)

LAST FOUR OF SOCIAL SECURITY # _____

DATED _____