

InorOut

TAX SERVICES

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Tax Year: 2022

Dear Client,

Thank you for choosing In or Out Tax Services, Inc. to assist you with your tax return. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

For our tax preparation fee, we will prepare your federal and state income tax returns, as well as any local tax returns we determine are needed. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. You are responsible for retaining supporting documentation of your tax return data.

On our website, you can find a checklist, organizers, and our Customer Information Sheet, all of which will help you collect and organize your tax information. The Customer Information Sheet is a form that will need to be completed every year. This document will help you avoid overlooking important information. By filling it out, you will contribute to the efficient preparation of your returns. **Please make sure your contact information is correct and legible.** In or Out Tax Services, Inc. will not accept responsibility for any failed attempts to contact you due to incomplete or inaccurate information on the Customer Information Sheet.

We have a secure portal for sharing documents. **Please do not email sensitive information.** Contact us and we will send you a link to your secure portal account. Once you create a password, you can upload information to us securely, and we can upload forms to you. We recommend you retain copies of your tax returns for a minimum of seven years. Our office will retain scanned copies of tax documents and records for a period of four years.

If you are self-employed or own rental property, your tax information must be provided to us in an organized fashion. You can fill out one of our organizer worksheets or provide us with the information in an equivalent format, such as a spreadsheet or accounting reports. Your tax preparation may be subject to extension or an additional time charge if we receive incomplete or unorganized data.

For your security, we can only accept information from you through the portal, regular mail, fax, or in person/dropped off. E-mail is okay if what is being sent does not contain sensitive information (such as social security numbers). Please do not text or Facebook message your tax documents to us.

We will not begin work on a tax return until we have all the information needed to complete the return; this includes the Customer Information Sheet, and this signed engagement letter. If, upon beginning a return, we discover that more information is needed, we will contact you with a list of required information and set your return aside until all the new information is received. This allows us maximum efficiency and accuracy. Returns are done on a first-come-first-served basis. Please allow a minimum of three weeks for your return to be completed. If you need a faster turnaround, please let us know right away and we will see if it is possible; faster turnarounds may have a rush fee assessed. Additionally, while it is our responsibility to contact you with any questions we might have, or when the return is complete, progress updates on returns significantly slow the process down and, therefore, are not a part of our procedure.

It may become necessary to apply for an extension of the filing deadline if there are unresolved tax issues or delays in processing, or if we do not receive all the necessary information from you on a timely basis. Returns initiated after March 1st, 2023, will likely lead to an extension. However, an extension is only for more time to file, not to pay. We will work with you to pay estimates, however, it is ultimately your responsibility to pay any late paying penalties, if you owe more when the return is filed after the April 17th, 2023, deadline.

If you have paid a deposit for your 2022 tax return and given us your basic information but more information is still needed to file an accurate return, we will automatically file an extension for you. However, if you have not given us a deposit and you do need an extension, please email or call us. **Even if we have filed extensions for you in the past, we require that you tell us one is needed at least two weeks before the filing deadline.**

Payment is due when your tax return is complete. If you have paid a deposit, it will be subtracted from the invoice amount and the remaining balance will be due. We will provide a copy of your return for you to examine. Once you have confirmed accuracy, then we will need a signed e-filing authorization (form 8879) and payment to file your return with the IRS and state agencies. **Without signatures by the taxpayer and spouse (if applicable), we legally cannot file the return.** If you have selected not to e-file your returns with our office, you will be solely responsible for filing the returns with the appropriate taxing authorities. You are responsible for submitting payments for any taxes owed to federal, state, and local entities. Review all tax-return documents carefully before signing them. We will provide copies of your return; one electronically and if requested, one printed copy. Extra printed copies can be provided for an additional fee. We will not send copies to third party vendors, such as mortgage lenders, as we cannot guarantee the security of your information.

Federal and State acceptance of electronically filed returns, or acceptance of paper returns ends the tax preparation engagement. Confirmation of Federal and State acceptance provided only upon request.

If you receive any Federal/State letters regarding a return we have prepared, please provide us with a copy in a timely fashion. There may be additional charges if you use our services to fix a problem resulting from missing or incorrect information, or for penalty abatement requests. We are only responsible for penalties or interest due to our error, not if you have failed to give us all your documents or did not provide us with information timely as previously outlined.

To affirm that this letter correctly summarizes your understanding of our guidelines for preparing your tax return and to complete this engagement, we will need a \$200 fee and your signature, **if this is a joint return, this letter must be signed by both spouses. The \$200 fee will go towards your 2022 tax return preparation fee. If for some reason, you do not complete your 2022 tax return with us, the fee is nonrefundable.**

Taxpayer Signature

Date

Spouse Signature

Date