2016 Individual Income Tax Preparation Engagement Letter

This engagement 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 Internal Revenue Service (IRS) imposes penalties on taxpayers, and Tax Preparers and Enrolled Agents, for failure to observe due care in preparing income tax returns. To ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements.

We will prepare your Individual and/or Business Federal and State Income Tax Returns for the calendar year 2016 in accordance with appropriate tax laws and regulations. Your returns will be prepared solely from the information provided by **you**. For speedy completion of your taxes, please provide any information promptly to our office when requested.

ALL TAX PREPARATION FEES ARE DUE AND PAYABLE AT THE TIME YOUR RETURN(S) ARE COMPLETED AND PRIOR TO ELECTRONIC FILING. THIS YEAR, AGAIN, WE ENCOURAGE ANYONE TO PREPAY AT THE TIME OF THE INTERVIEW OR DROP OFF.

TAX PREPARATION SERVICES are based on a flat fee charged based on your specific tax situation, the complexity of the return and the form(s) needed to complete your return. Additional charges may include research for basis, multi-state returns filed and accounting/bookkeeping, and amendments for prior years. These charges will be disclosed prior to incurring them and will be itemized on your invoice.

Occasionally we make mistakes, please forgive us for being human. Be courteous and let us know if you receive **any letters from the government**. We do correct returns for **free** and pay any penalties, **if we are at fault**. However, **we are not responsible to pay any taxes owed.**

No one can get your information from us without your permission, except for a government agency following due process of the law. If I am asked to disclose any privileged communication, unless I am required to disclose the communication by law, I will not provide such disclosure until you have provided written instructions to provide requested privileged information.

PLEASE REVIEW YOUR RETURN(S) CAREFULLY BEFORE SIGNING AND FILING THEM. If you have any questions, please call us. *THANK YOU* for allowing us to serve you this year. *WE GREATLY APPRECIATE YOUR BUSINESS.*

Sincerely yours,

Caitlin Campbell, EA

Tower Financial Partners is not responsible for providing any of the deductions taken on my tax return(s). I (we) have provided this information from my (our) own records and I (we) have proof of my (our) deductions and income. I (we) give my (our) permission to prepare my (our) tax return(s) and I (we) have read, understood and agree to the terms of this engagement and I (we) have read the privacy policy of this firm on the reverse side of this letter.
Printed Name (s):
____
Taxpayer's Signature: ____________________________________ Date: _________, 20_______
Spouse's Signature: ______________________________________ Date: _________, 20_______
It is the policy of Tower Financial Partners to keep all information that we collect from you confidential from all sources. We restrict access to all nonpublic personal information about you to

members of our firm who need to know the information to provide services to you. We do collect nonpublic personal information about you from the following sources:

• Information we receive from you on tax preparation organizers, worksheets, Federal and State tax reporting forms, and from other documents we use in tax preparation or other financial and related services.
• Information about your transactions with us, our affiliates and others.
• Information we may receive from outside agencies such as banks and brokerage houses.

We do not disclose any nonpublic personal information about our clients or former clients, except as permitted, required, or approved by you in writing as listed below:

• Requirements to comply with Federal, State or Local law.
• Requirements to comply with National, State or Local licensing rules.
• Requirements to disclose information in response to legal subpoenas.
• Items you permit or request us to disclose, as authorized by you in writing.
• Information that you authorize us to disclose by signing this engagement letter to electronically file your tax return, when applicable. • Information that you authorize us to disclose by signing this engagement letter, which discloses that you are our client, without disclosure of financial or other personal information.

Consent to Use of Tax Return Information

Federal law requires this consent form be provided to you ("you" refers to each taxpayer, if more than one). Unless authorized by law, we cannot use, without your consent, your tax return information for purposes other than the preparation and filing of your tax return. You are not required to complete this form. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year. If you do not consent, then you may still have your tax return prepared and electronically filed by us for a fee. For your convenience, we have entered into arrangements with a bank to provide qualifying taxpayers with the opportunity to apply for a Electronic Refund Deposit. To determine whether these products may be available to you or if you would benefit from these services. We will need to use your tax return information by analyzing it and calculating the amount of your anticipated refund. We also offer Personal and Small Business Financial Coaching and Tax Planning. If you would like us to use your tax return information to determine whether these products may be available to you while we are preparing your return, please sign and date this consent to the use of your tax return information. By signing below, you (including each of you if there is more than one taxpayer) authorize us to use the information you provide to us during the preparation of your 2016 tax return to determine whether to present you with the opportunity to apply for these products and services.

Printed name of taxpayer: ____
Taxpayer signature: _______________________________ Date:______________________________
Printed Name of joint taxpayer: ____
Joint taxpayer signature: ___________________________ Date:______________________________

• If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by e-mail at complaints@tigta.treas.gov.

Document Fees

You have chosen the professionals of Tower Financial Partners to prepare and file your tax return prior to April 18th, 2017. In doing so, you are personally telling us that you have received all of your tax information (W-2s, 1099s, etc.) and that your tax return is ready to be filed. In the event you receive additional information after we file your return, this document is your official notification that should you request our services in filing the required amended return; we will be charging you an additional minimum $100 for services rendered.

All clients will be given sent a link valid for 30 days to the digital copy of their tax return. Should you need the link resent, we will happily provide it to you; however, there will be a $20 charge.

If you wish to have printed copies of your return, please let us know. Printed returns are $25 and mailed printed returns are $50. We can only mail returns to the current address on file.

By signing this document, you – the client, agree that you understand and accept these provisions in our client billing.

______________________________ Client Printed Name

______________________________ Client Signature

______________________________ Date

______________________________ Client Printed Name

______________________________ Client Signature

______________________________ Date

______________________________ Tax Preparer's Initials

______________________________ Date of Service

Representation Reassurance Option

Yes, I elect to have the optional charge added to my tax preparation fee total for representation* services for the tax year 2016. This one time annual charge of $150 will cover any representation services I may require with respect to the IRS or a state Revenue Agency for my 2016 taxes prepared by Tower Financial Partners.

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Print Name Taxpayer Signature Date

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Print Name Spouse Signature
Date
Preparer
Initials_________________________Date____

NO, I decline the annual representation fee. I understand any representation* services needed for my 2016 returns will incur Tower Financial Partners' standard hourly rates of $190/hour which I will be responsible for.

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Print Name Taxpayer Signature Date

____

Print Name Spouse Signature
Date

Preparer
Initials_________________________Date____

*Representation includes answering any letters you receive from the IRS or a state taxing authority.