

CLIENT ENGAGEMENT LETTER – FORM 1040 TAX YEAR 2015

Sign and return this form to our office with your tax documents

Subject: Preparation of Your Individual Tax Returns

Dear Client,

Thank you for selecting Wayne Erdman CPA, Inc. to assist you with your tax affairs. This letter confirms the terms of our engagement with you and the nature and extent of services we will provide.

We will prepare your 2015 federal and all state and city income tax returns you request using information you provide to us. We may ask for clarification of some items, but we will not audit or otherwise verify the data you submit. All work in conjunction with your tax filings will be performed by employees of Wayne Erdman, CPA, Inc.

It is your responsibility to provide information required for preparation of complete and accurate returns. You should keep all documents, canceled checks and other data that support your reported income and deductions. They may be necessary to prove accuracy and completeness of the returns to a taxing authority. You are responsible for the returns, so you should review them carefully before you sign them. Your signature on either the tax returns or the electronic file authorization indicates that you have reviewed and agree with the information as presented in the returns. We are not responsible for the disallowance of doubtful deductions or inadequately supported documentation; nor for resulting taxes, penalties and interest.

Our work will not include any procedures to discover misappropriation of funds or other irregularities. The only accounting or analysis work we will do is that which is necessary for preparation of your income tax returns.

We will use our judgment to resolve questions in your favor where a tax law is unclear, if there is a reasonable justification for doing so. Whenever we are aware that a possibly applicable tax law is unclear or that there are conflicting interpretations of the law by authorities (e.g. tax agencies and courts) we will explain the possible positions that may be taken on your return. We will follow whatever position you request, so long as it is consistent with the codes and regulations and interpretations that have been promulgated. If the IRS should later contest the position taken, there may be an assessment of additional tax plus interest and penalties. We assume no liability for any such additional penalties or assessments.

The IRS may impose severe penalties for failing to disclose reportable transactions. We will insist that all such transactions be properly disclosed to us.

Your returns may be selected for audit by a taxing authority. Any proposed adjustments are subject to appeal. In the event of a tax examination, we can arrange to be available to represent you. Such representation will be a separate engagement for which an engagement letter will be provided to you. Fees and expenses for defending the returns will be invoiced in accordance with terms we agree on for that engagement.

All invoices for our fees are due and payable upon presentation. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (30) days.

(turn over)

WAYNE ERDMAN CPA

ACCOUNTING SERVICES & TAX PREPARATION

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We will retain copies of records you supplied to us along with our work papers for your engagement for a period of seven years. After seven years, our work papers and engagement files will be destroyed. All of your original records will be returned to you at the end of this engagement. You should keep the original records in secure storage.

If the above fairly sets forth your understanding, please sign this letter and return it to us with your tax documents. If you do not sign and return this agreement to us, we will assume that you concur with the same if data is supplied to compile your tax return.

We appreciate your confidence in us, and are pleased to have you as a client. Please call 614-442-0232 if you have questions.

WAYNE ERDMAN CPA, INC.
1051 OLD HENDERSON ROAD SUITE B
COLUMBUS, OH 43220

ACCOUNTANT IN CHARGE

CLIENT SIGNATURE(S):

Accepted By: Taxpayer: _____ Date: _____

Spouse: _____ Date: _____

(Both taxpayer and spouse must sign for preparation of joint returns)

PLEASE PRINT YOUR LAST NAME _____