

Haukeness Tax & Accounting Inc

103 5th Ave N
Strum, WI 54770
www.haukeness.tax
Phone: (715)695-2602 Fax: (715)695-2675

2023 Tax Year Engagement Letter for Tax Return Preparation

Client(s): _____ / _____
Business or Taxpayer Name / Spouse Name

Thank you for giving Haukeness Tax & Accounting Inc the opportunity to work with you this tax season. Please note that signed Engagement Letters are required for tax return preparation. This Engagement Letter is designed to confirm the terms of our services and both ours and your responsibilities during this process. **It is important that you read, sign, and return this Engagement Letter with your tax documents and questionnaire.**

Tax Preparation:

- We will prepare your federal and state tax return(s) with supporting schedules based upon information you provide. You agree to confirm that the information you provide is accurate and complete to the best of your knowledge.
- We will return your original records to you at the end of this engagement.
- Our policy is to process tax returns in the order that they are received per season. It is important that we receive your documents as soon as possible for timely filing. Please note, if we receive documents within 2 weeks of the filing date (regular or extension), we ask you to be patient as we may need to re-prioritize your return completion to allow for the best possible timing for all clients.
- We will perform accounting assistance or tax research necessary to complete the tax preparation at an additional charge.
- We may ask you to clarify some items but will not audit or otherwise verify the data you submit. We will inform you of any material errors, fraud, or other illegal acts we discover.
- We will not be responsible for penalties and/or interest charges that you might incur if you have not met your tax liability by the due date of the return. Whenever possible, we will attempt to advise you if we project that you may have any unmet tax liability.
- Where tax law is ambiguous or unclear, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.
- We reserve the right to withdraw from this engagement at any time for any reason.
- If your income tax return includes income from a business, farm, farm rental, or other rental activity you consent that you have authorized our business or you have filed on your own all required 1099's for any individual or business expense that is deducted on your income tax return.

Fee's & Payment:

- All preparation fees are invoiced per tax return per tax year.
- We accept cash, check, and debit/credit card as forms of payment as a courtesy to our clients.
- Tax preparation fees are due at the time the return is complete and before the tax return will be e-filed with the appropriate authorities.
- Our fee is based on the forms required to complete your return.
- If you terminate this engagement before completion, you agree to pay the higher of a \$50.00 terminating fee or for actual time and expenses incurred prior to the date of termination, even if the tax return(s) are not completed. You have the right to terminate this engagement at any time.

- In the event the client has any past due balances, we reserve the right to cease working on your tax return(s) or providing any other services until the balance has been paid in full or other acceptable payment arrangements have been made.
- Past due balances of more than 30 days are subject to interest charge to the extent permitted by state law.

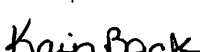
Important Notices:

- Your tax return(s) may be selected for audit by tax authorities. We are available to assist you in response to correspondence. However, we reserve the right to invoice for additional time and expenses incurred.
- One printed or electronic copy of your tax return(s) will be provided to you for your files. Additional copies are available for a fee (\$25 minimum). These fees apply to additional electronic copies for the time and effort involved in providing this service.
- If you require us to release a copy of your tax return(s) to a 3rd party (i.e., mortgage lender) we require a written documented permission. Forms are available on our website or at the office. A postage and/or processing fee (\$25 minimum) will be invoiced.
- The IRS recommends that you store your tax return and supporting documentation (canceled checks, receipts, etc.) for a minimum of three years. We recommend up to seven years and longer if you own/rent a business or farm. We will retain copies of your tax return and our work papers from your engagement for three years, after which these documents will be destroyed.
- Our engagement to prepare your 2023 tax return(s) will conclude with the delivery of the completed return to you (if paper-filing), for your signature and our subsequent submittal of your tax return (if e-filing). If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities.
- Review all tax-return documents carefully before signing them.
- By signing this agreement, you are confirming that all information, including any virtual asset transactions and other income, have been provided to accurately complete your 2023 tax return.

To affirm that this letter correctly summarizes your understanding of the arrangement for this work, please sign this letter in the space indicated and return it to us with your tax documents. **For a joint return, both spouses must sign (except for a surviving spouse).**

We appreciate your confidence in us. Please call (715) 695-2602 if you have any questions.

Sincerely,


Karin Back


Dean Boehne


Kye Back


Becky Adams


Sarah Roberts

Accepted By:

Taxpayer's Signature

Date

Spouse's Signature

Date