

Berman and Sons, LTD

Please Read, Sign, and

1. Bring to your tax appointment, or
2. Return with your tax data, if mailing or dropping off

Tax Preparation

We will prepare your tax returns with the greatest of care and diligence based on the information you supplied (documents, worksheets, questionnaire, and verbally). If you discover that any of the information supplied was not complete or accurate you are responsible for bringing that to our attention. If necessary, we will prepare a corrected/amended return. There will be an **additional fee** for that service. You are ultimately responsible for the accuracy of your tax returns. Therefore, it is imperative that you supply us with all applicable tax documents and accurately respond to our inquiries, whether verbal or written.

Our preparation fee covers the following:

- 1] Complete and accurate return(s) based on the information supplied.
- 2] If eligible, electronically submitting the return(s).
- 3] Making any corrections (or filing amended returns) if it is discovered that we made an error on the original return(s).
- 4] We will pay any penalties/interest charged if your return is adjusted for any error on our part.

Our preparation fee does not include:

- 1] Resolving tax matters with taxing authorities unless the inquiry (exam, mail audit, correspondence) is the result of an error on our part.
- 2] Reprints, re-runs or additional copies of your tax return(s). Additional copies of any year's return that we prepared is available via paper copy or PDF version for \$5.00 each.
- 3] Filing amended/corrected returns due to issues/items not presented or disclosed when the original return(s) was filed. This includes re-submitting electronic returns that have been rejected for reasons beyond our knowledge or control.

Should you need assistance with any of the above or any tax related matters (consultation, projections, planning) during the year, we are available at our standard billing rates. Please call if you wish to set up a meeting.

I/we have read the above and accept the terms of this engagement.

Taxpayer

Date

Spouse, if applicable

Date