



CARLSON TAX SERVICE
representing taxpayers before the IRS

Post Office Box 661
San Mateo, CA 94401
650 341-6645 415 519-1728

ENGAGEMENT LETTER FOR TAX PREPARATION

This engagement letter is to confirm our understanding of the preparation of your year 2009 income tax returns. Fees for my service are charged based on a per form/hourly rate; an estimate of fees will be provided to you prior to the preparation of your returns and I will inform you in advance if there are any significant changes to this estimate. Payment will be due upon completion of your returns.

You agree to furnish all of the information that is necessary for the preparation of your returns, and you represent that the written and oral information you are supplying to me is accurate and complete to the best of your knowledge. You further represent that you have the necessary documents, records, receipts, or other evidence to substantiate the items regarding income and deductions shown on your return. I will not independently audit or verify your information, although I may ask for certain items to be clarified. It is understood that the intent of the preparation of your tax returns is not to obtain the greatest refund or derive the lowest tax due, but to prepare the most *accurate* return possible with the information provided.

Tax returns are subject to examination (audit) and adjustments by the taxing authorities, which may result in additional assessments of tax, interest and penalties. You should retain tax records related to the current year's tax return for at least three years after its due date, since any additional assessments are usually made during this period. Generally, an assessment by the taxing authorities is presumed correct and must be rebutted by the taxpayer. If you receive any correspondence from taxing authorities, I encourage you to contact me to discuss the situation prior to your response; however, I do not assume responsibility for such assessments, and if you would like me to assist you in connection with the examination of your return, there will be additional fees for my service.

If you need any clarification or would like to discuss any of the above, please be sure to call me.

AGREED AND ACCEPTED (print name) : _____

Signature _____

Date _____

NOTICE REGARDING YOUR PRIVACY

Enrolled Agents are bound by standards of confidentiality and therefore I will protect your right to privacy. In the preparation of your tax returns, nonpublic personal information is collected from you or obtained by us with your authorization. For current and former clients I do not disclose any nonpublic personal information obtained in the course of preparing your tax returns except as required by law; I will not release any permitted personal information without your express consent and when information is shared, I will stress the confidential nature of the information. I retain records related to your tax returns for four years. I do my best to guard your nonpublic personal information by maintaining physical and electronic safeguards that comply with my professional standards.



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CONSENT TO USE OF PRIOR YEAR(S) TAX INFORMATION FOR PURPOSES OF TAX PLANNING

Federal law (*Treasury Department Regulation, Section 301.7216-3*) requires this consent form be provided to you. 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. If you do not complete this form, I can still prepare your taxes, but will be hindered in assisting you in other ways, mostly in the area of tax planning for future years based on this year's tax data. *By IRS rule, your consent cannot be given retroactively.*

Your consent is valid for one year.

I give my express permission to Glenn Carlson, E.A. (Carlson Tax Service) to use my current and prior year tax return information for purposes of future tax planning.

AGREED & ACCEPTED (print name) : _____

Signature _____ Date _____

If you believe any of your tax return information has been used or disclosed improperly, contact the Treasury Inspector General for Tax Preparation by phone at 1-800-366-4484, or by email at complaints@tigta.treas.gov.