

**AGE Financial Services**  
**433 W. Allen Ave. Suite 104**  
**San Dimas, Ca 91773**  
**909-592-5481**

**agefinancial.com**  
**ctec.org**

## **2018 Income Tax Return Engagement Letter**

Thank you for selecting AGE Financial Services to assist you with your tax affairs. This letter confirms the terms of our engagement with you and the nature and extent of the services we will provide. The IRS imposes penalties on taxpayers and tax return preparers for failure to observe due care in preparing income tax returns. In order to ensure an understanding of our mutual responsibilities, we ask all clients to confirm the following arrangements.

We will prepare your 2018 U.S. Individual Income Tax Return with all necessary supporting Forms and Schedules from the information provided by you. We may ask for clarification of some items, but we will not audit or otherwise verify the data you submit. It is your responsibility to provide us all the information required for the preparation of complete and accurate returns.

You represent that the information you are supplying to us is accurate and complete to the best of your knowledge and that any expenses claimed for supplies, meals, entertainment, travel, business gifts, dues and membership, vehicle usage, and/or charitable contributions or any other miscellaneous items are supported by records as required by law and that you have disclosed all known tax liabilities.

Prior to you signing the Tax return, you will be provided a complete copy of your income tax return to review. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. You have the final responsibility for your income tax return and, therefore, you should review your return carefully.

We must use our judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. In order to avoid penalties, we will apply the "more likely than not" reliance standard to resolve such issues. You agree to honor our decisions regarding the need to make protective disclosures in your return.

In the event you receive a letter from the IRS (excluding an audit request) on an income tax return we prepared, we will assist you in resolving the issue. Fees may apply to undisclosed tax liabilities. If you receive an IRS audit request, we will inform you of what they are requesting from you to provide the IRS examiner. Any proposed adjustment maybe subject to rights of appeal.

**To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign below. In signing this engagement letter and meeting with a tax preparer you are agreeing to pay a non-refundable consultation fee of \$80.00**

**We appreciate your confidence in us.**

**Sincerely,**

**AGE Financial Services**

Taxpayer Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Spouse Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Surety Bond # LSM0083336