

## TERMS OF ENGAGEMENT LETTER

Thank you for choosing Albert Lea Tax Service to assist you with your taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide. We have enclosed an organizer to help you gather the information required for a complete return. If you use the organizer, it will help you avoid overlooking important information, and it will help us to efficiently prepare your returns.

It is your responsibility to give us information required for the preparation of complete and accurate returns. We will not audit or verify the data you submit, although we may ask for clarification or require specific additional documentation. You are certifying that the information you provide to us can be substantiated by appropriate documentation, and that it is true, correct, and complete to the best of your knowledge. You are responsible for the accuracy of your financial records and the full and accurate disclosure to us of all relevant facts affecting your returns. Our work does not include procedures to discover or disclose material errors, fraud, illegal acts, or other defalcations. You have final responsibility for the income tax returns and must carefully review them before you sign them. Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, 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.

Our fee will be based on data entry and priced per form plus any additional services provided. Invoices 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. If you need an additional copy of your return printed, there is a \$5.00 charge for each year. If you need a digital copy emailed to you, there is a \$10.00 charge. All digital copies will be sent encrypted and password protected.

We will return your original records to you at the end of this engagement. You should securely store these records, along with all supporting documents, canceled checks, etc., as these items may later be needed to prove accuracy and completeness of a return. We will retain copies of your records and our work papers for your engagement for three years, after which these documents will be destroyed. Our engagement to prepare your tax returns will conclude with the delivery of the completed returns to you (if paper-filing), or your payment, 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.

We do not file extension automatically. If you want us to request an extension, you must notify us no later than April 14, 2026. Please note that an extension is an extension of time to file the return, and not an extension to pay taxes due.

As between yourselves, you have agreed that there may be a complete and full disclosure and exchange of information that we receive from either of you. Accordingly, we will be free to share information with one of you that we receive from the other. Our understanding regarding the sharing of information applies regardless of the time and manner in which it is communicated to us. We are preparing a joint return because your interests and positions are consistent. You will each sign the joint return, since you are each our client.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign and date in the space below and return to Albert Lea Tax Service at the time you do your taxes.

I agree to get SMS tax return completion notifications from Albert Lea Tax Service to the phone number(s) provided (frequency varies). Message and data rates may apply. Text STOP to opt-out. Albert Lea Tax Service respects your right to privacy, you can view our terms and privacy policy at [www.albertleataxservice.com/SMS-Terms-and-Privacy-Policy.php](http://www.albertleataxservice.com/SMS-Terms-and-Privacy-Policy.php)

---

Taxpayer Signature

Print Name

Date

---

Spouse Signature

Print Name

Date