

ALBERT LEA TAX SERVICE
502 S BROADWAY
ALBERT LEA, MN 56007

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 will prepare your federal and state income tax returns. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit.
- We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will, of course, inform you of any material errors, fraud, or other illegal acts we discover.
- Our fee will be based on a schedule charged per form/schedule as needed to complete your return. Additional charges may include: research basis of stocks/bonds or assets sold, multi-state returns filed, accounting work, tax consultation, amended taxes, which are identified separately on your invoice. Invoices are due and payable upon pick up.
- 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 3 years, after which these documents will be destroyed.
- Our engagement to prepare your tax returns will conclude with your signature, payment and our subsequent submittal of your tax return (if e-filing).

PRIVACY POLICY

Albert Lea Tax Service keeps all nonpublic personal information that we collect from you confidential. We collect information about you from various sources, including:

- Interviews regarding your tax situation
- Applications, organizers, or other documents that supply such information as your name, address, telephone number, Social Security Number, number of dependents, income, and other tax-related data
- Tax-related documents you provide that are required for processing tax returns, such as Forms W-2, 1099R, 1099-INT and 1099-DIV, and stock transactions
- We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as requested by our client(s) in writing or as required by law
- We restrict access to personal information concerning you, except to our employees who need such information in order to provide products or services to you.
- We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your personal information.

Albert Lea Tax Service is not responsible for providing any of the deductions taken on my tax return. I (we) have provided this information from my own records and I have proof of my deductions and income. I (we) give our permission to prepare my (our) tax return and I (we) have read, understood and agree to the terms of this Engagement Letter and Privacy Policy.

Taxpayer

Date

Spouse

Date

CONSENT TO DISCLOSURE TAX RETURN INFORMATION

Federal law requires this consent form to be provided to you. Unless authorized by law, we cannot disclose without your written consent, your tax return information to third parties for purposes other than the preparation and filing of your tax return. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution by those we give it to.

If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year.

I authorize Albert Lea Tax Service to disclose to _____

E-mail: _____ Fax: _____

My complete tax return information for the year(s) of _____

This consent shall be valid for one year or until (Enter date to expire) _____

Signature: _____ Date: _____

Print Name: _____

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by e-mail to : complaints@tigta.treas.gov.