InorOut
TAX SERVICES
3828 SE Division St.
Portland, OR 97202
503.239.0659

Tax Year: 2019

Dear Client,

Thank you for choosing In or Out Tax Services, Inc. to assist you with your tax return. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

For our tax preparation fee, we will prepare your federal and state income tax returns, as well as any local tax returns we determine are needed. 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. You are responsible for retaining supporting documentation of your tax return data.

The Customer Information Sheet is a form that will need to be completed every year. This document will help you avoid overlooking important information. By filling it out, you will contribute to the efficient preparation of your returns. **Please make sure your contact information is correct and legible.** In or Out Tax Services, Inc. will not accept responsibility for any failed attempts to contact you due to incomplete or inaccurate information on the Customer Information Sheet.

Most appointments will be 30 minutes in length. This will allow us to look through your tax documents and paperwork to ensure we have everything we need and that we understand your tax situation. However, we will most likely not be completing your return at the initial appointment. On our website, you can find a checklist, organizers, and our Customer Information Sheet, all of which will help you collect and organize your tax information. **It may become necessary to apply for an extension of the filing deadline if there are unresolved tax issues or delays in processing, or if we do not receive all of the necessary information from you on a timely basis. Returns initiated after March 15th will likely lead to an extension.**

We will not begin work on a tax return until we have all of the information needed to complete the return; this includes the Customer Information Sheet and this signed engagement letter. If, upon beginning a return, we discover that more information is needed, we will contact you with a list of required information and set your return aside until all the new information is received. This allows us maximum efficiency and accuracy. Returns are done on a first-come-first-served basis. Please allow a minimum of two weeks for your return to be completed. If you need a faster turnaround, please let us know right away and we will see if it is possible; faster turnarounds may have a rush fee assessed. Additionally, while it is our responsibility to contact you with any questions we might have, or when the return is complete, progress updates on returns significantly slow the process down and, therefore, are not a part of our procedure.

We have a secure portal for sharing documents. **Please do not scan and email sensitive information.** Contact us and we will send you a link to your secure portal account. Once you create a password, you can upload information to us securely, and we can upload forms to you. We recommend you retain copies of your tax returns for a minimum of seven years. Our office will retain scanned copies of tax documents and records for a period of four years.

For your security, we can only accept information from you through the portal, regular mail, fax, or in person/dropped off. E-mail is okay if what is being sent does not contain sensitive information (such as social security numbers). Please do not text or Facebook message your tax documents to us.

If you need an extension, please email or call us. Even if we have filed extensions for you in the past, we require that you tell us one is needed before the filing deadline.

If you are self-employed or own rental property, your tax information must be provided to us in an organized fashion. You can fill out one of our organizer worksheets or provide us with the information in an equivalent format, such as a spreadsheet or accounting reports. Your tax preparation may be subject to extension or an additional time charge if we receive incomplete or unorganized data.

Payment is due when your tax return is complete. We will provide a copy of your return for you to examine. Once you have confirmed accuracy, then we will need a signed e-filing authorization (form 8879) and payment to file your return with the IRS and state agencies. **Without signatures by the taxpayer and spouse (if applicable), we legally cannot file the return.** If you have selected not to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. You are responsible for submitting payments for any taxes owed to federal, state, and local entities. Review all tax-return documents carefully before signing them. We will provide copies of your return; one electronically and one print. Extra print copies can be provided for an additional fee. We will not send copies to third party vendors, such as mortgage lenders, as we cannot guarantee the security of your information

Federal and State acceptance of electronically filed returns, or acceptance of paper returns ends the tax preparation engagement. Confirmation of Federal and State acceptance provided only upon request.

If you receive any Federal/State letters regarding a return we have prepared, please provide us with a copy in a timely fashion. There may be additional charges if you use our services to fix a problem resulting from missing or incorrect information, or for penalty abatement requests.

To affirm that this letter correctly summarizes your understanding of our arrangements for this work, please sign below. **For joint returns, this letter must be signed by both spouses.**

Tax Payer Signature Date

Spouse Signature Date