



## **Individual Income Tax Engagement Letter**

We will prepare your Individual Federal and State Income Tax Returns for 2011 using the information you provide us. If you have taxable activity in a state other than Colorado, you are responsible for informing us of the applicable state(s). We will not audit or verify the data you submit to us; however we may ask you for additional information. It is your responsibility to provide all information necessary to complete your tax returns. Your 2012 estimated income tax payment vouchers will be based on your 2011 income tax returns unless you provide us with additional information. You have the final responsibility for the information on your income tax returns. Before signing, review carefully for accuracy and completion, as well as omissions or misstatements.

You should retain copies of all the documents, receipts, canceled checks and other records needed to substantiate the items of income and deductible expenditures which are claimed on your return. We do not keep original documents. Any original information and documentation will be returned to you with your completed tax returns. We will include a copy of your tax return for your records. Additional copies will be provided for a fee of \$25 per paper or faxed copies and \$15 for E-mailed copies per return. We will not release your information to anyone else without your prior written consent. Also, we cannot release to you information or tax returns prepared for your dependents over the age of 16 without prior written consent from them.

Fees for our services will be at our standard rates. Your income tax preparation fee does not include bookkeeping services, tax planning, tax projections, or tax consultation services. Other additional fees may include copy costs and computer processing fees. Payment is due and payable upon completion. All income tax return preparation fees must be paid in full prior to the release of the return. We are not responsible for any late fees, penalties or interest imposed by the various taxing authorities for failure to file timely. Any preparation services canceled prior to completion will be billed for time spent at the standard hourly rate of \$120 per hour.

Your returns are subject to review by taxing authorities. Should an examination occur, we will be available to represent you for an additional fee. If you wish us to represent you it is imperative that you notify us immediately upon receipt of a notice from a taxing agency proposing a change to any income tax return.

We must receive all information necessary to prepare your return by March 31, 2012, to ensure that your return will be completed by April 15, 2012. If we do not have all the necessary information, you will need to file a request for an extension of time to file. We will not file extensions unless you specifically

request us to do so. If you wish us to prepare an extension for you, you must notify us by April 2, 2012. If you have provided us with adequate information, we will estimate the amount of tax that you should send with your extension if applicable. Fees for this service begin at \$40. This estimate will be based solely on the information you provide to us, and we are not responsible for under estimation of tax due to missing information. If we do not have all information necessary to complete your tax returns by April 15, 2012 and an extension *is not filed*, you may be subject to late filing or late payment penalties by the taxing authorities.

We appreciate the opportunity to serve you. Please date and sign below to acknowledge your agreement with and acceptance of your responsibilities and terms of this engagement. It is our policy to initiate services after we receive this executed engagement letter.

_____	_____	_____
<b>Print Your Name</b>	<b>Signature</b>	<b>Date</b>
_____	_____	_____
<b>Print Spouse's Name</b>	<b>Signature</b>	<b>Date</b>

Please provide your preferred phone number and e-mail address:

Phone: \_\_\_\_\_

E-mail address: \_\_\_\_\_

Best Regards,

LeAnn Wilson & Associates, Inc.  
Tax and Accounting Specialists

**6770 Foxtrot Lane  
Colorado Springs, CO 80924  
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