

TAS TAX & ACCOUNTING SERVICES – TAX ENGAGEMENT LETTER: TAX YEAR 2025

This Household Engagement Letter applies to all tax services provided by TAS Tax & Accounting Services to you and any related business entities for the applicable tax year(s).

This document constitutes the full engagement agreement between you and TAS Tax & Accounting Services. By returning your completed organizer, this engagement letter, tax documents, or other requested information to our office, you acknowledge that you have read, understand, and agree to all terms outlined below.

By submitting your engagement letter, organizer, or tax documents, you acknowledge and agree that you have received, read, and understand this engagement letter in its entirety; you accept all terms, limitations, responsibilities, and exclusions described below; and you authorize TAS Tax & Accounting Services to prepare and file your personal and/or business tax returns in accordance with these terms.

If you do not agree with any portion of this engagement, you must notify us in writing BEFORE returning your materials. If no objection is received, we will proceed under the assumption that you consent to this engagement.

Our services may include preparation of federal individual or business income tax returns (e.g., Forms 1040, 1120-S, 1065, 1120); preparation of applicable state and local business tax returns; electronic filing where permitted; and follow-up questions related to the prepared return.

Services NOT included unless separately engaged in writing include tax planning or projections; payroll services or payroll tax filings; sales and use tax filings; audit of documents we receive; notice representation; or legal or investment advice. We rely entirely on the information you provide and do not audit or verify data. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or illegal acts, though it may be necessary to clarify some of the information you submit. We will inform you of any material errors, fraud, or similar elements we discover.

You are responsible for providing complete, accurate, and timely information; maintaining adequate records for all income, expenses, and deductions; and reviewing all returns for accuracy prior to filing.

Fees are based on the complexity of the work performed and the quality and completeness of information provided. Pricing will be communicated separately and may change if scope changes.

Our responsibility is limited to the services described in this engagement. We are not responsible for penalties, interest, or additional tax resulting from incomplete, inaccurate, or late information provided by you. The law may impose penalties or interest. Call us if you have any questions or concerns with regards to these.

Electronic communication may be used. We will retain records in accordance with firm policy and professional standards.

We will return your original records to you at the end of this engagement. Store these records, along with all supporting documents and produced documents in a secure manner. We retain copies of your records and our work for seven years, after which these documents may be destroyed.

No signature is required. Returning your organizer, engagement letter, or tax documents constitutes acceptance of this engagement.

Thank you as always for the opportunity to be of service. If you have any questions, please contact our office.

TAS Tax & Accounting Services

(412) 487-6471

LandmarkTAS.com