



Bottom Line Tax Solutions
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TAX ENGAGEMENT LETTER

This letter is to confirm our understanding of the terms of our agreement and outline the nature and extent of services we will provide. Based upon the information you furnish to us, we will prepare your Federal and applicable state income tax returns for 2020.

We will not audit or verify the data you submit to us, although we may ask you for clarification when necessary. All the information you submit to us will, to the best of your knowledge, be correct and complete and include all other information necessary for the completion of your tax return.

We will also prepare 2021 estimated tax vouchers if required, based on your income and withholding taxes for 2020. If you anticipate a substantial change in income or withholding taxes for 2021, please advise us as soon as possible. We will then determine whether an adjustment should be made to your tax estimates.

Your returns are subject to review by the taxing authorities. Any items that may be resolved against you by the examining agent are subject to certain rights of appeal. In the event of an examination, we will be available upon request to represent you, or to review the results of any examination. Billing for these additional services will be at our standard rates.

The charges for our services are based on our fee schedule and the complexity of the returns. **Invoices are due and payable upon completion of the return. We cannot E File your return until payment has been received.**

You have the final responsibility for your income tax returns. Please review them carefully before you sign and mail them.

If the above is in accordance with your understanding of the terms and conditions of our agreement, please sign and return a copy of this letter.

Accepted by:

Client signature

Date

BOTTOM LINE BUSINESS SOLUTIONS

Corporate Return Information Form:

Company Name: _____

Address: _____

City/State/Zip: _____

Contact Person: _____

Best Contact Telephone Number: _____

Fax: _____ Email: _____

QUICKBOOKS DATA FILE INFORMATION:

ADMIN LOGIN: _____

QuickBooks Version: _____

PASSWORD: _____

SHAREHOLDER INFORMATION:

___ Yes ___ No Is this the first return filed for this business? If so, please complete the shareholder information page (See Attached)

___ Yes ___ No Has there been any change in shareholder's or ownership percentages since last year? If so, complete shareholder information page. (See Attached)

___ Yes ___ No Has shareholder addresses changed since last year? If so, please complete shareholder information page (See attached)

OUR FIRM HAS ELECTED TO PROVIDE OUR CLIENTS WITH THEIR TAX RETURN COPY IN AN ELECTRONIC FORMAT (SECURE EMAIL) IF FOR SOME REASON YOU PREFER TO RECEIVE A PRINTED COPY INSTEAD OF THE ELECTRONIC COPY, PLEASE CHECK BELOW:

_____ PAPER COPY REQUESTED.

SHAREHOLDER INFORMATION:

SHAREHOLDER'S NAME: _____

Is this the initial return for this shareholder? Yes No
Has the shareholder's information changed from last year's return? Yes No

If you answered yes to either question above, please complete the following information for this shareholder:

ADDRESS: _____

CITY/STATE/ZIP: _____

PERCENTAGE OWNED: _____ Social Security Number: _____

SHAREHOLDER'S NAME: _____

Is this the initial return for this shareholder? Yes No
Has the shareholder's information changed from last year's return? Yes No

If you answered yes to either question above, please complete the following information for this shareholder:

ADDRESS: _____

CITY/STATE/ZIP: _____

PERCENTAGE OWNED: _____ Social Security Number: _____

SHAREHOLDER'S NAME: _____

Is this the initial return for this shareholder? Yes No
Has the shareholder's information changed from last year's return? Yes No

If you answered yes to either question above, please complete the following information for this shareholder:

ADDRESS: _____

CITY/STATE/ZIP: _____

PERCENTAGE OWNED: _____ Social Security Number: _____

COMPLETE ADDITIONAL PAGES IF NECESSARY