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Don Brooks & Associates, Inc.

SIGNATURE(S) REQUIRED ON BACK OF LETTER

GENERAL LETTER OF ENGAGEMENT FOR INDIVIDUAL TAX RETURN PREPARATION

This letter is to inform you, the taxpayer(s), of the services we will provide you and the responsibilities you have for preparation of your tax return(s).

Tax Return Preparation
We will prepare your 2023 federal and state income tax returns from information that you provide. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information.

This engagement does not include any audit or examination of your books or records. In the event your return is audited, you will be responsible for verifying the items reported.

The tax preparation fee does not include bookkeeping. Additional fees apply for these services.

Fees charged for tax preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities. Preparation fees do cover limited assistance and consultation during the year.

Please store your supporting documents and copies of your tax returns in a secure place. You may be assessed a fee if you request a copy in the future.

We will use professional judgment in resolving questions where the tax law is unclear or where there may be conflicts between the taxing authorities' interpretations of the law. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.

Taxpayer Responsibilities
You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.

You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.

You must be able to provide written records of all items included on your return if audited by the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.

You have the final responsibility for the income tax returns and therefore, you should review them carefully before you sign them.

Fees not paid within thirty (30) days of the invoice will be charged a finance charge of 1.5% per month (18% per annum)**.**

The filing deadline for the 2023 income tax return is April 15, 2024. In order to meet this filing deadline, the information needed to complete the return should be received no later than March 31, 2024. If an extension of time is required, any tax that may be due with this return must be paid with that extension. Any amounts not paid by the filing deadline are subject to interest and late payment penalties when those amounts are actually paid.

Signatures
By signing below, you acknowledge that you have read, understand and accept your obligations and responsibilities and that you understand our responsibilities in preparing your returns as explained above. For a joint return, both taxpayers must sign.

_____	Date _____	_____
Client signature		Client signature (2)
_____		_____
Printed name		Printed name

Privacy Policy. The nature of our work requires us to collect certain nonpublic personal information about you from various sources. We collect financial and personal information from applications, worksheets, reporting statements and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to any third party without your express written permission, except where required by law. We maintain physical, electronic and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access. Please contact us with any questions regarding our privacy policy.