

Authorization to Prepare Taxes Form

January 2024

Thank you for choosing our company to prepare your income tax returns for 2023. This letter confirms the services we will provide.

We will prepare your federal and state returns for tax year 2023 based on information you provide. Although our work will not include procedures to discover irregularities or inaccuracies in the tax data you provide, we may ask for clarification of certain information, or additional information, so that we can prepare accurate and complete returns for you.

It is your responsibility to provide necessary information related to income and deductions for tax year 2023, and to respond to our inquiries in a timely manner so that we are able to accurately complete your returns by the appropriate due dates.

You are responsible for maintaining appropriate records, such as official tax documents you receive, receipts and substantiation for your deductions and purchase and sales information for assets.

It is your responsibility to review your returns before they are filed to determine that all income has been correctly reported and you have substantiation for your deductions. Filing your returns by the due dates is your responsibility.

If your returns are later selected for review or audit by taxing authorities, we will be glad to assist or represent you if you desire. Our fees for preparing your returns do not include time that might be necessary to assist you during a taxing authority.

If this letter accurately summarizes your understanding of our agreement relating to the preparation of your tax returns, please sign the enclosed in the space indicated and bring with you to your appointment or attach to your paperwork for preparing your taxes.

Thank you again for choosing our company to prepare your 2023 tax return. We appreciate your business.

Accepted by:

_____	Date _____
_____	Date _____