

# Paul Dion CPA

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## ENGAGEMENT AGREEMENT

December 04, 2023

Subject: Preparation of 2023 Tax Returns

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Thank you for choosing Paul Dion CPA to assist with the 2023 taxes for . This letter confirms the terms of the engagement and outlines the nature and extent of the services we will provide.

We will prepare the 2023 federal and state income tax returns for . We will depend on management to provide the information we need to prepare complete and accurate returns, **and we depend on you to provide complete data at the time of delivery to avoid additional charges. Extra work resulting from inadequate records or other issues may result in additional charges.** We may ask management to clarify some items but will not audit or otherwise verify the data submitted.

We will perform accounting services only as needed to prepare the tax returns. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for management to clarify some of the information submitted. We will inform management of any material errors, fraud, or other illegal acts we discover.

The law imposes penalties when taxpayers underestimate their tax liability. Call us if there are any concerns about such penalties.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on the behalf of , the alternative selected by management.

**Although our fees are fixed, extra work resulting from inadequate records or other issues may result in additional charges. See our fee schedule for additional items.** Invoices are due in advance and payable upon presentation. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (30) days.

We will return the original records to management at the end of this engagement. These records, along with all supporting documents, canceled checks, etc., should be securely stored, as these items may later be needed to prove accuracy and completeness of a return. We will retain copies of the records and our work papers for the engagement for seven years, after which these documents will be destroyed.

Our engagement to prepare the 2023 tax returns will conclude with the delivery of the completed returns to management (if paper-filing) or with the tax matters partner's signature and our subsequent submittal of the tax return (if e-filing). If management has not selected to e-file the returns with our office, management will be solely responsible to file the returns with the appropriate taxing authorities. The officer signing the tax return should review all tax-return documents carefully before signing them.

**Additional services such as response to IRS letters, Audits and tax planning are not covered by our tax preparation fees. See our Corporate Gold Maintenance agreement which outlines many of our other services at an affordable fixed fee.**

**Review all tax return documents carefully before signing them. You have the final responsibility for income tax returns, and therefore you should review them carefully before you sign them and/or sign the electronic signature authorizing us to e-file.**

To affirm that this letter correctly summarizes the arrangements for this work, sign the enclosed copy of this letter in the space indicated and return it to us in the envelope provided.

Thank you for the opportunity to be of service. For further assistance with your tax needs, contact our office at (508)853-3292.

Sincerely,

Paul Dion  
Paul Dion CPA

Accepted By:

\_\_\_\_\_  
Officer

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name of S-Corporation