



Monroe Tax Connect

Engagement Letter and Privacy Policy

Preparation of your federal and/or state tax return(s):

Thank you for choosing Monroe Tax Connect to assist you with filing your taxes this year. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare and submit your federal and/or state tax returns for any of the last three tax years. Our responsibilities do not include the preparation of any other tax returns that may be due to any taxing authority.

Client Communications

We will prepare your federal and state income tax returns based on the information you furnish to us. It is your responsibility to provide the information required for the preparation of a complete and accurate return. You should keep all documents, canceled checks, receipts, and other data that support your reported income and deductions. They may be necessary to prove the accuracy and completeness of the returns to a taxing authority. We will not audit or otherwise verify the data you submit to us, although we may ask you to clarify some of it. In order to timely file your tax returns, we need all required information no later than 5 days prior to the tax filing deadline.

Our work will not include any procedures to discover defalcations or other irregularities. The only accounting or analysis work we will do is that which is necessary for the preparation of your income tax returns.

Your returns may be selected for audit by a taxing authority. Any proposed adjustments are subject to appeal. In the event of a tax examination, we can arrange to be available to represent you. Such representation will be a separate engagement for which an engagement letter will be provided to you. Fees and expenses for defending the returns will be invoiced in accordance with the terms we agree to for that engagement.

Fees/Prices

Any estimate we give is based upon the information you initially provide to us. Actual fees may vary as circumstances change and/or newly corrected information is made available. Tax preparation fees start at a minimum of \$185. All fees and costs incurred to prepare your income tax return are due and payable before the return is released.

We will store your records, along with all supporting documents, in a secure location. We retain copies of your records and our work papers from your engagement for up to seven years, after which these documents will be destroyed.

Initials

Privacy Policy

Your privacy is important to us.

We collect personal information (which may include, without limitation, your name, email address, social security number, date of birth, credit card information, mailing address, and/or telephone number) from you when you voluntarily sign up on the Client Portal or when you request information or service (e.g., tax preparation services).

Additional information may be gathered during your subsequent use of our services, or when we communicate with you via telephone, email, or other means. This personal information may include, without limitation, your employment and income information, your bank account information, and tax return information, and associated IRS filings.

We highly value your trust and confidence in us and want to assure you that your personal information is kept completely confidential. We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as requested by our clients or as required by law. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your personal information.

Opt-Out

We give our clients the opportunity to opt-out of receiving communications or services from Monroe Tax Connect at any time prior to their return being released to the IRS. The following options are available for removing your information from our database, so as not to receive future communications or to no longer use our services.

-You can send an email to info@monroetaxconnect.com (**Subject Line:** Opt-Out)

-You can call or text us at (617) 798-4579

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign and provide your full social security number in the space indicated.

Taxpayer's Printed Name

SSN

Taxpayer's Signature

Date Signed

Taxpayer's Email Address

Initials

Spouse's Printed Name

SSN

Spouse's Signature

Date Signed

Spouse's Email Address

Initials