

EPIC Bookkeeping & Tax

Engagement Agreement

This letter confirms the terms of our agreement and the nature of the services we will provide.

Client: [Client Full Name]

Services: [Description of services, e.g., Tax Preparation for Tax Year 2024]

Scope of Work:

We will prepare the federal and applicable state tax returns based on the information provided by you. We are not auditing or verifying the information and will rely entirely on the accuracy of your records. For bookkeeping services, we will maintain accurate books using the documents you provide.

Fees:

The fee for these services is [Fee Amount], due [Payment Terms, e.g., upon completion or in advance]. Any additional work outside the scope will be quoted separately.

Electronic Filing Authorization:

You authorize us to electronically file your tax return and to communicate with the IRS or state agencies on your behalf as needed.

Termination:

Either party may terminate this agreement with written notice. Fees for work completed up to termination are non-refundable.

EPIC Bookkeeping & Tax

Engagement Agreement

Dispute Resolution:

Any disputes will first be addressed through direct negotiation. If unresolved, we agree to mediation in Mount Juliet, TN before any legal action.

Acceptance:

By signing below, you agree to the terms of this engagement.

Penny Candy Oller, Owner

[Client Name]

EPIC Bookkeeping & Tax

Date: _____

Date: _____

www.epic-tax.org | pennycandy011@epic-tax.org | 615-582-0751