

BETSY KLEEHAMER, CPA



Tax & Accounting

TAX RETURN ENGAGEMENT LETTER

Return Type(s): Federal and State Individual Tax Return Tax Year: 2025

Thank you for selecting Betsy Klee hamer, CPA Inc., to assist you with the filing of your tax returns. This letter confirms the terms of our engagement with you and the nature and extent of services we will provide.

- We will prepare only the returns listed above using the information you provide. We may provide a checklist to assist you in gathering this information, but it is your responsibility to provide the information required for the preparation of complete and accurate returns. We may ask for clarification of some items but will not audit or otherwise verify the data you submit.
- Our services are not intended to determine if you have filing requirements in taxing jurisdictions other than your home state. It is your responsibility to provide our firm with all the information necessary to prepare any additional state or city returns and inform us of the applicable states.
- **It is also your responsibility to inform us of any interest or authority over foreign bank accounts, assets, trusts, or financial interests to determine if other filings may be required.** If you do not provide our firm with information regarding foreign assets, we will not be able to prepare any of the required forms. In the absence of such information being provided, we will presume you do not have any foreign assets or financial interests and will not file any applicable disclosure forms.
- It is your responsibility to inform us of any gifts given more than the federal annual limit (\$19,000 for 2025) to determine if a gift return will be required.
- **You acknowledge that you have reported all income, including barter income, cryptocurrency, and consumer-to-consumer activity.**
- We will use professional judgement in preparing your returns. If a tax law is unclear or there are conflicting interpretations of the law, we will explain the possible positions and adopt the position you choose, so long as it is consistent with codes and regulations.
- **It is your responsibility to carefully review, examine, and approve your completed tax returns before signing and mailing them to the taxing authorities.** We are not responsible for the disallowance of doubtful deductions or inadequately supported documentation, nor for resulting taxes, penalties, and interest. We will rely on information you provide from third parties, including, but not limited to, K-1's, 1099's, 1098's and similar items.
- It is our policy to keep records related to this engagement for three years after which they will be destroyed. We do not keep any original forms, and these will be returned to you at the end

of the engagement. When records are returned to you, it is your responsibility to retain and protect your records for possible future use, including potential examination by any government or regulatory agency.

- We are available to represent you for services related to responding to inquiries or examination by taxing authorities. This is not included in your tax preparation fee and you will be billed separately for time and expenses involved. You agree to immediately notify us upon receipt of correspondence from any agency covered by this letter.
- Privacy laws prohibit us from disclosing your information to any third party without express written consent. In order to protect your identity, we may need to verify your birthdate and/or social security number when you contact us.
- We utilize a secure web portal to send and receive sensitive documents. While we will use our best efforts to keep communications secure in accordance with our obligations under applicable laws and professional standards, you recognize and accept that we have no control over the unauthorized interception of these communications once they have been sent and you consent to our use of these devices during this engagement.
- We do not accept any responsibility for information intercepted or disclosed to a third party, when it is communicated in an unsecure manner, this includes information or documents sent by unsecured email, text, or unsecured drop offs.

We appreciate the opportunity to serve you for your accounting needs. Please sign and date this letter to acknowledge your agreement with and acceptance of your responsibilities and terms of this engagement. It is our policy to initiate services after receipt of this executed engagement letter.

Sincerely,

Betsy Kleehamer, CPA

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, the taxpayer and spouse (if applicable) must sign below.

Taxpayer: _____

Date: _____

Spouse: _____

Date: _____

Privacy Policy

CPAs, like all providers of personal financial services, are now required by law to inform their clients of their policies regarding privacy of client information. CPAs have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. Therefore, we have always protected your right to privacy. We collect nonpublic personal information about this that is provided to us by you or obtained by us with your authorization.

For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except and required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, and in limited situations, to unrelated third parties who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared. We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.