

JILL W. LEOPOLD LAW, LLC

214 S. Belmore Street, Leipsic, Ohio 45856
Phone (419) 943-2149 Fax (567) 208-5313

Jill W. Leopold

Larry E. Leopold
Retired

TAX PREPARATION AGREEMENT

Please complete this form, sign
(a typed signature is acceptable)
and return via mail or scan and
upload to our secure portal by
January 31, 2024

Client

Name: _____

Client

Phone: _____

Client

Address: _____

Client

Email: _____

Introduction

Thank you for choosing Jill Leopold Law, LLC for your tax planning and compliance needs. We are a full-service tax firm dedicated to the success of our clients' individual and business needs.

Scope of Work

You are retaining our office for the purpose of tax preparation. Our office will not provide legal services or consulting pursuant to this agreement. Representation before the IRS is available for a separate hourly fee.

We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit.

We will perform accounting services only as needed to prepare your 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 you to clarify some of the information you submit. We will inform you of any material errors, fraud, or other illegal acts we discover.

The law imposes penalties when taxpayers underestimate their tax liability. Call us if you have 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 risk and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

Fee Structure and Billing

Payment is due in full when work is completed. Work is "complete" when the return is ready to be signed and prepared for filing with the IRS. We will not submit any returns without full payment. All invoices are mailed (or e-mailed) monthly and due within 10 days of receipt. The client agrees to a 1.5 % late fee (calculated monthly or payments not received within 10 days of invoice).

Exchange of Documents and Use of Secure Portals

Our office provides a secure message / document portal. If you do not already have the portal, we just need a valid e-mail address to send a link to for you to set up an account. We use this portal for secure messages, document upload and sending invoices.

Audit Protection

While your likelihood of a tax audit is low, an audit can be time consuming and unpleasant. Our office provides no guarantees, implied or otherwise, regarding your likelihood of an audit or results of an audit. We will engage the IRS on

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your behalf in the event of an audit.

Payment of Taxes Owed

The tax preparer will provide vouchers for making tax payments, including quarterly payments upon request, inside the tax return. Our office recommends visiting the taxing agency's website and making electronic payments whenever possible using the taxpayer's (not the spouse's) Social Security number or business TIN. Retain the date of the payment, confirmation number, and the amount in a secure location.

Miscellaneous Provisions

We will return your original records (copy of return, etc.) to you at the end of this engagement. A Client Copy of the tax return will be provided to you. Store these records, along with all supporting documents, in a secure location. Additional copies of your tax return documents may be available for a fee. If you have not selected to submit tax forms with our office, you will be solely responsible to file the returns with the appropriate authorities. Review all forms carefully before signing them. Follow-up questions after signature may require a new client agreement.

Thank you for the opportunity to be of service. If you have any questions, contact our office at (419) 943-2149.

By Signing this Engagement Letter, the Client Agrees:

I understand that Jill Leopold Law, LLC will not begin work until I have provided all documents necessary to prepare my tax return(s) and certify that I have provided all tax documents requested by my tax preparer and known to me.

Unexpected additional work is sometimes required in the course of tax preparation and/or planning despite the best efforts at transparency of both Jill Leopold Law, LLC and our clients. In the event we identify additional work it required to preform that is not outlined here, we will contact the client with an estimate prior to executing that additional work.

Signature of Taxpayer or Authorized Representative

Date

Business Name (Print)

Title of authorized Signatory

Would you like to enroll in Client Concierge Service for 2024? \$100-Individual, \$200- Business YES NO