



## TAX ENGAGEMENT AGREEMENT

### *RETURNS INCLUDED IN THIS ENGAGEMENT*

Type	Filing Due Date	Period Covered
Partnerships	3/15/2023	2022
C Corporations	3/15/2023	2022
S Corporations	3/15/2023	2022
Personal	4/17/2023	2022
Estates & Trusts	4/17/2023	2022
Not for Profits	5/15/2023	2022

**SCOPE OF ENGAGEMENT:** The scope of this engagement is to prepare only the returns or work noted above unless otherwise communicated in writing. Any other return, or other work not covered by this or other engagement agreements, is to be done by you or by others.

**DOES NOT COVER REVIEW BY TAX AUTHORITIES:** It is understood that all tax returns are subject to review by taxing authorities. The agreed fee for this engagement does not provide for assistance you might need in connection with inquiries, examinations, or assessments by authorities including any and all correspondence therewith.

**SUBSEQUENT TAX ADVICE EXCLUDED:** This engagement does not include advice as to the conduct of affairs in the future. All taxpayers are advised, however, to maintain records of anything affecting tax returns for the last five years. PK Tax Services, LLC does not, and cannot, provide legal advice or representation. In no event shall any recommendation or advice provided by PK Tax Services, LLC be construed as legal advice or recommendations. You will need to seek independent and appropriate legal advice for matters requiring such.

**NO INDEPENDENT VERIFICATION:** Returns will be prepared on the basis of information and documents supplied by you and by others designated by you, and it is understood that no independent verification, including audits of any nature, will be made of such records. Accordingly, you agree to provide accurate information on a timely basis to facilitate the preparation and submission of tax filings. Should data be provided that is misleading or false or otherwise incorrect, you agree to indemnify and hold harmless PK Tax Services, LLC from all resulting liability therefrom. Additionally, should information be submitted to PK Tax Services, LLC such that there is an unreasonable time to prepare and submit filings or returns, especially during the tax season, you understand that taxing authorities may impose certain penalties and/or interest which will be your responsibility.

**PRIVACY POLICY:** All information you provide to us in connection with this engagement will be maintained by us on a strictly confidential basis. You recognize that in the interest of facilitating our services to you or your company, we may communicate by facsimile transmission or send electronic mail over the Internet. Such communications may include information that is confidential to you or your company. While we will use reasonable efforts to keep such communications secure, you recognize and accept that we have no control over the unauthorized interception of these communications once they have been sent, and consent to our use of these electronic devices during this engagement.

**TERMINATION AND OTHER TERMS:** We reserve the right to withdraw from this engagement without completing the returns if you fail to comply with the terms of this engagement letter. Upon such an event, all work performed to that point shall be billed and be due for payment by you upon receipt. If any portion of this agreement is deemed invalid or unenforceable, said finding shall not operate to invalidate the remainder of the terms set forth in this engagement. Additionally, if we, in our sole discretion, believe a conflict has arisen affecting our ability to service you and/or your business in accordance with either the ethical standards of our firm or the ethical standards of our profession, we may be required to suspend or terminate our services. Such an event would also be subject to this paragraph in its entirety.

**FEES FOR THIS ENGAGEMENT:** Our fee will be based upon our standard hourly rates, plus any out-of-pocket costs such as computer processing charges, long distance calls, postage, transportation, and travel. All fees are subject to the terms and conditions under this agreement; see Tax Fee Methodology for 2023. Estimated fees for this engagement will be based on your previous return pending any changes. If you are new, returns are typically in the range of \$395-\$695 for personal and \$595-\$895 for corporate. These are just estimates and can be more depending on your return and what is involved. Any unforeseen conditions such as incomplete accounting, missing documentation or changes in your tax circumstances that require additional labor hours or filings could cause the fee to exceed the estimate. Fees should be paid in full at time prior to efilings.

**PAYMENTS, INTEREST & RELEASE OF INFORMATION:** All fees and charges associated with this engagement are due upon your pick-up, our delivery or our submission of your return(s) and filing(s). Amounts remaining unpaid after 30 days, from such events bear interest of 1.5% compounded monthly. Should any balances be outstanding for services rendered before this engagement (“Outstanding Balances”) such Outstanding Balances must be paid in full (including associated interest that may have accrued) before: 1) any delivery or submission of your return(s) or filing(s) related to this agreement are made; or 2) any release of information, returns(s) or filing(s) related to this or prior engagements are provided to you or any third party you designate to receive such information, return(s) or filing(s).

**COLLECTION:** Should payment(s) for this engagement not be made within 90 days, or within another reasonably agreeable timeframe to PK Tax Services, LLC then any collection fees and/or attorney and court fees borne by PK Tax Services, LLC for the purposes of such collection will be paid by you in addition to the fees and interest quoted above. Should your business not be able to pay for services rendered, you personally agree to cover any and all such charges and obligations as set forth in this agreement.

**AGREEMENT:** Your signature below represents your agreement with the terms and conditions above. Notwithstanding your signature or lack thereof below, your acceptance of the onset of services, or absence of written correspondence from you to PK Tax Services, LLC suggesting that services are not desired, will be indicative of your agreement to the terms and conditions noted above.

\_\_\_\_\_  
(Taxpayer Signature & Date)

\_\_\_\_\_  
(Spouse Signature & Date)

\_\_\_\_\_  
(Please Print Name)

\_\_\_\_\_  
(Please Print Name)