



**LYNN-MARK ENTERPRISES, LLC**  
**TAX & BUSINESS CONSULTANTS**

Phone (212) 213-6592 Fax (646) 304-8263

Email: Taxquestions@lynnmark.com

**Individual Tax Return Preparation Engagement Letter**

Client Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Thank you for selecting Lynn-Mark Enterprises, LLC to assist you with your individual and/or business tax returns. This letter confirms the terms of our engagement and the nature and extent of services we will provide to you and/or your company.

We will prepare your \_\_\_\_\_ federal and all state income tax returns you request using information you provide to us. We may ask for clarification of some items, but we will not audit or otherwise verify the data you submit. We can provide an organizer or you can use our tax checklist to help you gather the information required for a complete return. If you use the organizer or tax checklist, it will help you avoid overlooking important information and contribute to efficient preparation of your returns.

It is your responsibility to provide information required for preparation of complete and accurate returns. You should keep all documents, canceled checks and other data that support your reported income and deductions. They may be necessary to prove accuracy and completeness of the returns to a taxing authority. You are responsible for the returns, so you should review them carefully before you sign them.

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 preparation of your income tax returns.

We agree to provide conscientious, competent and diligent services and at all times will seek to achieve solutions that are just and reasonable for you. However, because of the uncertainty of legal proceedings, the interpretation and changes in the law and many unknown factors, accountants cannot and do not warrant or guarantee results or the final outcome of any case.

The law provides various penalties that may be imposed when taxpayers understate their tax liability. You acknowledge that any such understated tax, and any imposed interest and penalty thereon, are your responsibility, and that we have no responsibility in that regard. If you would like information on the amount or the circumstances of these interest and penalties, please contact us.

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. Fees and expenses for defending the returns will be invoiced in accordance with terms we agree on for that engagement.

Our fee for preparation of your tax returns will be based on the nature and complexity of the tax return and is due and payable at completion. Additional charges for tax extensions, computer and software services, report production and out of pocket costs may be added to our bill. Such charges are in addition to any estimated fees quoted. Interest charges may be added to all accounts not paid within thirty (30) days.

We will retain copies of records you supplied to us along with our work papers for your engagement for a period of four years. After four years, our work papers and files will be destroyed. All of your original records will be returned to you at the end of this engagement. You should keep the original records in secure storage.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign the enclosed copy of this letter in the space indicated and return it to us. We appreciate your confidence in us. Please contact us if you have questions.

Sincerely,

Bonnie Yormack

**ACCEPTED AND AGREED:**

\_\_\_\_\_  
Taxpayer

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse (if applicable)

\_\_\_\_\_  
Date