

Tax Preparation Engagement Agreement

This Tax Preparation Engagement Agreement ("Agreement") is entered into on [Date], by and between:

1. [Tax Preparer's Name], with a business address at [Preparer's Address] (hereinafter referred to as the "Tax Preparer").
2. [Client's Name], residing at [Client's Address] (hereinafter referred to as the "Client").

WHEREAS, the Client wishes to engage the services of the Tax Preparer to prepare and file their tax returns, and the Tax Preparer is willing to provide such services under the terms and conditions outlined below.

NOW, THEREFORE, the Tax Preparer and the Client agree as follows:

1. Services:

The Tax Preparer will provide tax preparation and filing services for the Client's [specific tax year] federal and state income tax returns.

2. Client's Responsibilities:

The Client shall provide all necessary and accurate information and documentation required for the tax preparation process. The Client is responsible for the accuracy and completeness of the information provided.

3. Fees and Payment:

The Client agrees to pay the Tax Preparer the sum of [Fee Amount] for the tax preparation services. Payment is due upon the completion of services and before filing the tax returns. Payment can be made by [Payment Method].

4. Return Filing:

The Tax Preparer will file the Client's tax returns electronically or by mail, as appropriate.

5. Confidentiality:

The Tax Preparer will maintain the confidentiality of all client information and will not disclose it to third parties, except as required by law.

6. Limitation of Liability:

The Tax Preparer's liability for errors or omissions in the tax preparation process is limited to correcting such errors at no additional cost to the Client.

7. Termination:

Either party may terminate this Agreement with written notice. Upon termination, the Client is responsible for any fees incurred up to the termination date.

8. Governing Law:

This Agreement shall be governed by and construed in accordance with the laws of [Jurisdiction].

IN WITNESS WHEREOF, the parties have executed this Tax Preparation Engagement Agreement as of the date first above written.

[Tax Preparer's Name]

[Client's Name]

Signature:

Signature:

Printed Name:

Printed Name:

Date:

Date: