

Individual Tax Return Engagement Letter

Thank you for choosing Shurson Group to assist you with your 2023 individual taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your 2023 individual federal and state income tax returns. 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. A questionnaire is provided to help you collect the data required for your return. The questionnaire will help you avoid overlooking important information. By using it, you will contribute to the efficient preparation of your returns and help minimize the cost of our services.

To timely file your tax returns, we need all required information no later than March 18, 2024. You may be required to request an extension if we do not receive all required information by the above date. We do not file extensions automatically. If you want us to request an extension, you must notify us in writing no later than April 10, 2024. Please note that an extension is an extension of time to file the returns, and not an extension to pay any taxes owed.

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 risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select. If the tax authority should later contest this issue, there may be an assessment of additional tax, interest, and penalty. Shurson Group assumes no liability of any such assessment.

Our fee is based on the time required at standard billing rates plus out-of-pocket expenses. Invoices are due and payable upon presentation. All accounts not paid within thirty (30) days are subject to interest charges to the extent permitted by state law. Our guarantee policy: The taxpayer is always responsible for their tax owed. We will cover any penalties and interest for a preparation error.



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We will return your original records to you at the end of this engagement. Store these records, along with all supporting documents, in a secure location. We retain copies of your records and our work papers from your engagement for up to seven years, after which these documents will be destroyed.

We may terminate our representation of you if you fail to pay our statements when due, if you insist that we pursue objectives that we consider imprudent, unprofessional or unethical, or if we feel further representation is not warranted for other reasons. If we elect to terminate our engagement, our engagement will be deemed to have been completed upon written notification of termination, even if we have not completed your returns. You are obligated to pay for services provided and costs incurred through the date of termination.

If you have not selected to e-file your individual returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them. Our engagement to prepare your 2023 individual tax returns will conclude with the delivery of the completed returns to you, or with e-filed returns, with your signature and our subsequent submittal of your tax return.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, sign the copy of this letter in the space indicated and return it to us.

Thank you for the opportunity to be of service. If you have any questions, contact our office at (507)206-0677.

Very truly yours,
Shurson Group

Accepted by:

Print Name(s)

Taxpayer #1 Signature

Date

Taxpayer #2 Signature (as applicable)

Date



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