

## PERSONAL INCOME TAX PROJECTION ENGAGEMENT LETTER

This letter confirms and specifies our understanding concerning the tax projection services that Roberts Accounting CPAs, P.C. (the "Company") will perform for you, the taxpayer, (as representative of both you and your spouse, if applicable.) By signing this engagement letter and/or sending us the information for the preparation of your income tax projection(s), you and all parties referenced in this letter are agreeing to the terms of our engagement.

### Tax Projection Service

The Company will prepare your Federal and/or State income tax projection(s) for all jurisdictions that you are required to file in based on your specific request and stated purpose for the projection(s). We will use our best judgments and abilities when preparing your tax projection(s).

Roberts Accounting CPAs, P.C. is not required to audit the information that you provided to us as it relates to your projection(s). Therefore, it is your responsibility to make sure that the information that you provide is true and accurate to the best of your abilities.

As the preparer of your tax projection(s), the Company understands that you have the right and freedom to consider other professional tax and accounting services, should ours not suit your needs. However, if you choose to take your business elsewhere, please be aware that the Company holds the right to bill you for all services that have been rendered on your behalf.

The Company's fees for tax projection(s) preparation are based on the time required for all work performed, the complexity of any technical issues addressed, the need to confirm information or to perform accounting work as a precondition to preparing your projection(s), and the timely receipt of all essential information. Work performed in relation to this engagement will be invoiced upon the reasonable completion of your tax projection(s) and will be due to the Company upon your receipt of the invoice.

### Your Responsibility to Provide Information

In order to properly and most accurately prepare your tax projection(s), it will be necessary for you to provide us with all general, financial and income tax information that we request.

Agreed and Accepted:

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Date

We will provide you with a questionnaire, and/or other request forms. These forms will list all pertinent documentation and information needed for the preparation of your projection(s). Please respond to these requests completely and in a timely manner. If for any reason you are unable to provide us with all pertinent tax information and documentation it may result in incomplete and/or inaccurate tax projection(s). If we are unable to complete your tax projection(s) due to not receiving the documentation required from you to accurately complete them, the time spent on the projection will still be billed and due.

### Your Copy of Your Tax Projection(s)

We will provide you with a copy of your income tax projection(s) either electronically or by paper.

### Estimated Taxes

Federal and State law requires taxpayers to make estimated tax payments as they relate to the taxpayer's tax liability for the current year. Failure to make sufficient estimated tax payments to the IRS or the state(s) to which you reside, may result in assessed tax penalties. When we send you your completed tax projection(s), we may also provide you with a recommended schedule of Federal and/or State tax estimated payments. There is no guarantee that this estimated payment schedule will in fact prevent you from being assessed for underpayment tax penalties. If, after completing your tax projection(s), we find that you have a tax liability to one or more taxing authorities, we will assist you by providing you with information on how you may make these payments. It will be *your* responsibility however, to make sure that all amounts due are paid to the taxing authority.

### Confirmation of Your Understanding

By either signing below, sending us the information for the preparation of your income tax projection(s), and/or submitting the projection request form on our website I am confirming that I fully understand the terms set in place by this engagement letter and that all questions and/or concerns that I expressed to the Company, as they relate to these terms, were answered in a timely fashion and prior to my signing of this document. I understand that the Company is not responsible for the accuracy or truthfulness of the information that I provide them as it relates to my tax projection(s).

### Privacy Policy

The nature of our work requires us to collect certain nonpublic personal information about you from various sources. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to any third party without your express permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access. Please contact us with any questions regarding our privacy policy.