

# JAMES C HENRY EA, INC.

## Letter of Engagement – 2023 Income Tax

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

Email: \_\_\_\_\_ Phone #: \_\_\_\_\_

*You are asked to sign this form in order to set the terms of our relationship. In the event of any review by a governing agency, this form will provide a written statement that your return was prepared based on factual information you provided and that no intentional miss-statement was intended.*

1. I have retained JAMES C HENRY EA, INC. to prepare my 2023 income tax return.
2. **I understand that payment for services must be made at the time of service, and prior to the electronic filing of both my Federal and State tax returns. By signing I am providing authorization to run my credit card, or process my check.**
3. If any Tax return is initiated, individual is responsible for any preparation/form fees regardless if client decides to complete filing or not.
4. All information given to my preparer is correct to the best of my knowledge and can be documented.
5. **You agree that you are entitled to the credits on your tax return, and the preparer asked the appropriate questions to verify you qualify for the credits and you will maintain appropriate records for at least 3 years from the filing date of your return. These credits include: earned income credit(EITC), child tax credit (CTC), additional child tax credit(ACTC), credit for other dependents (ODC), and American opportunity tax credit(AOTC)Nothing has been added which would overstate deductions or credits.**
6. Nothing has been deleted which would understate my income.
7. I agree to review my return prior to submitting it to the Federal and State governments to verify that all income and expenses have been correctly stated.
8. If additional documentation is presented after your return is completed, additional fees will be charged to correct or amend the return.
9. Filing of my 2023 tax return constitutes my acceptance of the statements contained in this document.
10. In the event of a review by any government agency, I understand additional hourly fees will be charged by JAMES C HENRY EA, INC for representation. A review includes any letters, adjustments and audits.
11. Once refunds are processed by E-File or Mail, we are no longer responsible on the decisions made by the IRS. In addition, if you owe other debts to the federal government or to a state government, the IRS must apply your refund to those debts, before issuing your refund.
12. Tax payers claiming Tip Out deductions must be able to upon request by federal and state agencies provide Documentation.
13. For a copy of our privacy statement, please visit our website at [www.jameshenryinc.com](http://www.jameshenryinc.com) under the forms tab.

\_\_\_\_\_  
Taxpayer Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse Signature