TLF ASSOCIATES

943 Dixwell Ave, Suite C

Hamden, CT 06514

**Engagement Letter**

This Engagement Letter confirms the arrangements for our tax return preparation services. We will prepare your Individual and/or Business Federal and State Income Tax Returns for calendar year 2021 in accordance with appropriate tax laws and regulations. Your returns will be prepared solely from the information **provided by you**. For speedy completion of your taxes, please promptly provide any information requested by the communicated due date. All provided information is kept confidential. **We do not disclose your information to anyone without your direct permission, except for a government agency following due process of law.**

We must receive all information to prepare your tax return by April 8, 2022 (drop offs) and April 14, 2022 (appointments), to ensure that your return will be completed by April 15, 2022. If we have not received all your information by then, it is possible that you will have to file an extension. You may be subject to late filing penalties/under payment penalties and interest.

You should retain all documents, canceled checks, and other data which supports your basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to taxing authorities.

**ALL TAX PREPARATION FEES ARE DUE AND PAYABLE WHEN YOU PICK UP YOUR COMPLETED RETURN(S). Please note that NO TAX RETURNS will be sent off without receiving payment first.**

We reserve the right to require retainers at our discretion. The retainer is an estimate of work to be performed and additional payment may be due on a case-by-case basis.

**TAX PREPARATION SERVICES are based on a fee schedule, charged per form(s) and/or schedule(s) needed to complete your return(s).** Additional charges may include: multi-state returns filed, tax consultation for estimates, amended taxes for prior year(s), and FAFSA reports.

**OTHER ADDITIONAL FEES:** $49.95 starting fee for Audit Protection Program. $20 for Electronic Filing Service. $50 for Refund Transfer Filing. $25 for non-sufficient checks. $10 per additional hardcopy of your tax return. You must come into the office in person to pick up your tax return. Minimum fee of $75 for any letters that we write to the IRS or State Agencies at your request in response to a letter from them.Per IRS policies, we are prohibited from faxing or emailing your tax return to anyone, including government agencies.

Occasionally we make mistakes. If we make an error on your return, we will correct your return at no cost and pay for any penalties and interest. However, we are not responsible for paying any taxes owed. Please inform us of any letters received from any taxing authority. \*Please note we do offer Audit Protection.

**PLEASE REVIEW YOUR RETURN(S) CAREFULLY BEFORE SIGNING AND FILING THEM**. Thank you for allowing us to serve you this year! **WE GREATLY APPRECIATE YOUR BUSINESS!**

**TLF ASSOCIATES is not responsible for providing any of the deductions taken on my tax return(s). I have provided this information from my own records, and I have proof of my deductions and income. I (we) give permission to prepare my (our) tax return(s) and I (we) have read, understood and agree to terms of this permission/engagement and privacy policy act letter.**

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 **Tamelia Fleming**

**TLF ASSOCIATES**

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Taxpayer **(PRINT)** Signature **Date**

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Spouse and/or Business Partner **(PRINT)** Signature **Date**

**Privacy Policy Act**

It has always been the policy of TLF ASSOCIATES to keep all information that we receive from you, confidential. We restrict access to all nonpublic personal information about you to members of our firm who need to know that information to provide services to you. We collect nonpublic personal information about you from the following services:

* Information we received from you on tax preparation organizers, worksheets, Federal and State tax reporting forms, and from other documents we use in tax preparation or other financial and related services.
* Information about your transaction with us, our affiliates, and others.
* Information we may receive from outside agencies such as banks and brokerage houses.

We do not disclose any nonpublic personal information about our clients or former clients, except as permitted, required, or approved by you in writing as listed below:

* Requirements to comply with federal, state or local law.
* Requirements to comply with national, state or local licensing rules.
* Requirements to disclose information in response to legal subpoenas.
* Items you permit or request us to disclose, as authorized by you in writing.
* Information that you authorize us to disclose by signing this engagement letter to electronically file your tax return, when applicable.
* Information that you authorize us to disclosed by signing this engagement letter, which discloses that you are our client, without disclosure of financial or other personal information.