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ENGAGEMENT LETTER

Please sign and date page 2 and return back to our office.

January 2013

Dear Valued Client(s):

Happy New Year! Our office is excited to welcome a new staff member, Rino Manfroni. He is from Rimini, Italy, a UT Arlington graduate, and currently finishing his Masters in Taxation. He's also a CPA Candidate and we are confident that he will bring new vitality and a fresh perspective to our office.

This Engagement Letter is provided to minimize the possibilities of any misunderstandings and to clarify our office policies and procedures. We are asking all clients to please read this letter to better understand how this will affect you. If possible, please return a signed letter to our office within a week of receipt so we can update your records before tax season.

We require this signed letter from you in order to start work on your tax return.

We thank you in advance for your understanding and patience as our practice continues to evolve and grow.

Extension Policies:

Individual 1040: The initial tax due date for the 2012 Federal Individual Income Tax Return is April 15, 2013. If we don't receive your tax information **by March 1st**, your tax return will automatically be filed for an extension. If there is a balance due with your extension, it is suggested to send in an extension payment. Please remember that an extension is an extension of time to file but not an extension of time to pay. Any amounts not paid by the filing deadline will result in additional interest and late payment penalties.

Due to the requirements of scheduling, workflow logistics in our office and the volume of work that comes in, we are setting some guidelines to have adequate time to better prepare all of our clients' tax returns. We well understand the complexity of taxes and the busy-ness of everyday life and how easy it is to put off attending to the filing of income tax returns. We are encouraging our clientele to give us the bulk of their documents as early as possible so we can get a jump on completing them. Documents that are delayed may be submitted as you receive them.

The extension final due date is October 15, 2013. On the tax returns that are extended, we require at least some tax information be submitted to our office by **July 1st**. We are applying a new premium filing fee on accounts that provide their information after this date. However, if you submit a portion of your information by this date, there will no additional fees. If any extenuating circumstances arise or you wish to know more about this policy, please contact our office.

Corporations, S-Corporations, LLC's: The initial 2012 tax return due date for Corporations is March 15, 2013 and April 15th, 2013 for LLC's. If a corporation or LLC would like to be filed by the first due date, information needs to be in by **February 15th**. Extensions are automatically filed on the entity's behalf for Federal and State. If an entity is on extension, the due date is September 15, 2013. We ask that we receive all information by **July 1st**. We are applying a new premium filing fee on accounts that provide their information after this date. As previously mentioned, if you submit your information by this date, there will be no additional fees.

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Tax Return Copies: Per “IRS Bulletin 2004-33”, we are no longer required to mail out hard copies of tax returns. Most clients will be provided an electronic PDF copy via email. Clients with no access to email will be provided hard copies via US Mail, free of charge. If you would like a paper copy of your tax return in addition to the electronic copy, please contact our office.

Professional Fees: Our invoice is **due upon receipt** of the completed tax return. We are now introducing a new service, called a **Refund Transfer (RT)**, available for Individual 1040’s only. An RT is an option that most taxpayers can opt to have the tax preparation fee taken out of their refund for a service fee of \$35. **Fees will be quoted at the time of preparation.** We still accept check, credit/debit cards, and cash. We also reserve the right to ask for retainer fees to be paid in advance of work from new clients or with any client with whom we have experienced payment delays.

It is your responsibility to provide all the information required for the preparation of a complete and accurate return. You should retain all the documents, cancelled checks and other data that form the basis of income and deductions for up to three years. **You have the final responsibility for the income tax return, and therefore, you should carefully review them before you sign and date the IRS E-File form 8879.**

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign the enclosed copy of this letter in the space indicated and return it to our office via email, fax, mail, or drop off.

Please do not hesitate to contact our office with questions or comments. For additional information, you can also visit our website at: www.jlewiscpa.com. Again, we sincerely appreciate your business!

Regards,

Jack F. Lewis, CPA

(Both husband and wife must sign for preparation of joint returns)

Acknowledged By: _____ (Primary Taxpayer)

_____ (Spouse)

Please print name(s) _____

Date: _____

Comments or additional requests: