

AGA Tax and Retirement Advisors

Engagement Disclosure

Thank you for choosing AGA Tax to assist you with your 2020 taxes. This confirms the terms of our engagement and outlines the nature and extent of the service we will provide. We will prepare your 2020 Federal and State Income Tax return, (plus any past year(s) returns upon your instruction.) Our work will not include procedures to find defalcations or other irregularities, unless otherwise stated. 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, of course, inform you of any material errors we discover. The law imposes penalties when taxpayers underestimate their tax liability. Please call us if you have concerns about such penalties. Our fee will be based on the time required at standard billing rates plus out of pocket expenses. Invoices are due and payable upon presentation. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (30) days. The fees for these services are indicated on the invoice accompanying the tax return. Please note additional fees will be charged if any documents are provided after the completion of the tax return. You will be contacted prior to the addition of any extra fees. We will return your original records to you at the end of this engagement. You should securely store these records, along with all supporting documents, canceled checks, etc., as these items may later be needed to prove accuracy and completeness of a return. We may retain scanned copies of your records and our work papers for your engagement for seven years, after which these documents will be destroyed. Our engagement to prepare your 2020 Federal tax return(s) will conclude with the delivery of the completed return(s) to you (if paper filing) or your signing, and the subsequent submittal, of your tax return (if e-filing). If you have not selected to e-file your returns with our office, you will solely be responsible to file the returns with the appropriate taxing authorities. Review all tax return documents carefully before signing them. Please note you will be provided one copy of your federal income tax return and all attachments. If you require additional copies, AGA Tax will charge a minimum of \$25.00 for each copy requested. To affirm this letter correctly summarizes your understanding of the arrangements for this work, please sign below. We appreciate your confidence in us. If you have any questions, please call our offices at (866) 728-3697 or email us at [info@savemyretirement.com](mailto:info@savemyretirement.com). (Both spouses must sign for preparation of joint returns.)

This Engagement is Accepted By:

Taxpayer\_\_\_\_\_

Spouse\_\_\_\_\_

Date\_\_\_\_\_