



Engagement Letter/Disclosures

This letter must be signed prior to conducting any business with our clients.

Subject: Engagement Letter

We are pleased to be able to serve you in preparing your 2014 federal and state income tax returns. This letter is to specify and confirm the terms of our engagement with you and to clarify the nature and extent of the services we will provide.

We are tax preparers (NOT a CPA, Enrolled Agent or Tax Attorney) who will prepare your 2014 federal and state income tax returns from information you will furnish us. It is your responsibility to provide all the information required for the preparation of complete and accurate returns.

We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. Our engagement cannot be relied upon to disclose errors, irregularities, or illegal acts, including fraud and defalcations, which may exist. We may inform you of any such matters that come to our attention. In addition, we will use professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing agencies' interpretation of the law and other supportable positions.

You should retain all the documents, cancelled checks, and other data that form the basis of income and deductions to support the accuracy and completeness of the returns in the event your return is selected for review by either the IRS or the State Board. You have the final responsibility for the income tax returns and should review them carefully before signing them.

If your refund is withheld by the IRS or any other debt collection agency you are responsible for paying all tax preparation fees out of pocket within a 30 day period.

If the foregoing fairly sets forth your understanding of this engagement, please sign the enclosed copy of this letter in the space indicated and return it to our office.

**Also, you will be given a complete packet of your signed tax documents; if you misplace them there will be a \$25 fee for copies during the year.

Sincerely,

Yuvonne C. Morris, MBA, Registered Tax Return Preparer
Larry R. Morris Jr. Tax Preparer, AFSP 2015

The engagement terms described in this letter are acceptable and hereby are agreed to.

Accepted by: _____ Date: _____

Accepted by: _____ Date _____