

# RLE Taxes Inc

7851 Mission Ctr Ct Ste 310  
San Diego, CA 92108  
russ@rletaxes.com  
Phone: (619)302-7928 | Fax: (619)719-5491

## Engagement Agreement for Tax Year 2019

Dear New Client,

Thank you for selecting RLE Taxes Inc to assist you in preparing your 2019 personal income tax returns. This letter confirms the terms of our engagement and the nature, timing, and limitations of the services we will provide.

We will prepare your 2019 federal and state income tax returns from information you furnish us. We will not audit or otherwise verify the data you submit, although it may be necessary to request clarification and/or documentation of some of the information. Generally, we will rely on your representation that you have maintained the documentation required by law to support the information you provide, including expenses for meals, travel, gifts, vehicle use, charitable contributions, etc. If you are not clear regarding what documentation is needed for any given item of income or deduction, we'd be happy to discuss it with you. **Review all tax return documents carefully before signing them.**

We have provided an organizer for your use. While we don't require its use, it may serve as a useful "tickler" to remind you of items to provide to us. We recommend you provide photocopies or electronic versions of all tax documents, including W-2s, 1099s, 1098s, and property tax statements, to prevent any loss of data. We will not be responsible for lost originals.

We will make every attempt to properly apply the Tax Code and legally minimize your tax liability. We will exercise professional judgment and will, whenever possible and justifiable, attempt to resolve any issues in your favor.

The filing deadline for the tax returns is April 15, 2020. In order to meet this filing deadline, we must receive your information in substantially complete form by April 1.

If an extension of time to file is required, we will use the information available to us at the time to prepare the extension. To prepare a valid, accurate extension, we need as much information as is available. We also need your express approval to file the extension on your behalf. **An extension, however, only provides you with an extension to file, not an extension to pay. Taxes paid after April 15 will result in late-payment penalties and interest.**

If a joint return is prepared, tax returns and copies of all supporting documentation will be made available to either spouse without the consent or notification of the other spouse.

You are responsible for reporting foreign activities. By signing this letter you acknowledge that you will inform us if you have income from foreign sources or if you have signatory authority over any foreign account. If you are unsure whether income or an account is foreign, we will review it. **Note that the penalties for failure to report foreign activities are severe.**

Our fees for tax preparation services are based on the complexity, expertise required, and amount of time required. All invoices are due and payable upon presentation. Tax returns will not be filed electronically until fees are paid in full.

Engagement of our services will begin once you have signed this agreement. In the event that you do not return a signed agreement but nonetheless verbally agree (or otherwise indicate by such actions as submitting the tax organizer, providing tax data, or filing the prepared returns) that we prepare returns on your behalf, all terms and conditions of this agreement shall apply. Your signature on federal or state e-file authorization forms shall be deemed acceptance by you of all terms in this agreement. Your engagement of our services will be deemed satisfied and conclude upon either our electronically accepted transmission of your tax returns or delivery of the completed returns to you for paper filing.

Your tax returns may be selected for review by the taxing authorities. If the government selects your return for examination, we will be available to assist you. There may be additional fees for post-filing services.

We generally retain, for seven years, the final work product generated for our clients. After the retention period, the documents are destroyed. We do not keep original documents — they are returned to you after completion of the returns. It is your responsibility to retain your records for possible future use, including possible examination by the taxing authorities.

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We are committed to safeguarding your confidential information, and we maintain physical, electronic, and procedural measures to protect your information. We will not disclose any information about you unless we have your approval as required by law, even if you are no longer our client. If you would like your records released to a third party, such as a mortgage lender, you must sign a disclosure statement.

You agree that our firm's liability for damages, unless caused by our gross negligence or willful misconduct, shall not exceed the total amount paid for the services described herein. This shall be your exclusive remedy. You further agree that RLE Taxes Inc will not be liable for any lost profits or for any claim or demand against you by any other party.

**Satisfaction Guarantee:** If you decide you're unhappy with our services and decide not to file your returns, your original records will be returned to you. An office consultation fee will apply.

**Accuracy Guarantee:** If we make a mistake completing your return, we will provide up to three hours of free Audit Services (valued at up to \$450), amend your tax returns for free, and pay any applicable accuracy related penalties up to \$1,000. RLE Taxes Inc will not be responsible for any additional taxes, interest, non-accuracy related penalties, or other fees.

Any dispute arising under this agreement or relating to our services, including but not limited to disputes regarding fees, the scope of the engagement, or professional malpractice, will first be submitted for non-binding mediation or alternative dispute resolution before litigation is filed. The participating parties shall share the costs of any mediation proceeding equally. Litigation, if undertaken, shall be conducted in the County of San Diego, California according to California state law.

This letter comprises the complete and exclusive statement of the agreement between the parties, superseding all proposals oral or written and all other communications between the parties. If any provision of this letter is determined to be unenforceable, all other provisions shall remain in force.

To confirm acceptance of this agreement in its entirety, please sign and date in the space indicated and return it to us. If this is a joint return, both spouses must sign.

Regards,  
Russ Emmons  
RLE Taxes Inc  
7851 Mission Center Court, Suite 310  
San Diego, CA 92108

(619) 302-7928  
[russ@rletaxes.com](mailto:russ@rletaxes.com)

\_\_\_\_\_  
(Client Signature)

\_\_\_\_\_  
(Print Name)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Spouse Signature)

\_\_\_\_\_  
(Print Name)

\_\_\_\_\_  
(Date)

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## Client Supplemental Information Worksheet

### New Client

#### DUE DILIGENCE (please circle yes or no)

Did you have health care coverage for yourself and everyone on your return for the entire year? **Yes | No**

Did you have signature authority over any foreign bank accounts last year? **Yes | No**

Did you have any foreign assets, holdings, or any gifts from a foreign source? **Yes | No**

Did you have any transactions using bitcoin or other crypto currencies? **Yes | No**

Do you have any other income not reported elsewhere (for example: Uber, Lyft, AirBnb, jury duty, prizes, cancelled debt, settlements, barter trades, stock/asset sales, side jobs, etc.)? **Yes | No**

#### TAX INFORMATION AUTHORIZATION (please circle yes or no)

I would like to file a Tax Information Authorization Form 8821 allowing RLE Taxes to inspect and/or receive confidential Federal tax information, including courtesy copies of any correspondence sent to me by the IRS. I expressly consent to the use of a third party electronic fax service to file this form. **Yes | No**

#### RETURN DELIVERY (please circle yes or no)

By default, completed returns are delivered to you by paper (postage and handling fees may apply). Instead, would you prefer to receive an electronic copy of your return delivered through secure web portal? **Yes | No**

#### GIVING BACK (please choose one)

At no extra charge to you, RLE Taxes will make a contribution to a charitable organization following the end of tax season. Please indicate your desired organization:

\_\_\_\_\_ San Diego LGBT Community Center (<http://www.thecentersd.org>)

\_\_\_\_\_ San Diego Special Delivery (<http://www.specialdeliverysandiego.org>)

\_\_\_\_\_ Mama's Kitchen (<https://www.mamaskitchen.org>)

\_\_\_\_\_ Alzheimer's Association of San Diego (<https://www.alzsd.org>)

\_\_\_\_\_ Parkinson's Association of San Diego (<http://parkinsonsassociation.org>)

\_\_\_\_\_ California State Parks Foundation (<http://www.calparks.org>)

\_\_\_\_\_ Other: \_\_\_\_\_