



## ENGAGEMENT LETTER, PREPARATION OF YOUR TAX RETURN(S)

Thank you for choosing **Tropical Tax Solutions** to assist you with your 2019 tax returns. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your 2019 federal and state income tax returns based on the information you provide. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. A Tax Organizer is available to help you collect the data required for your return and prevent you from overlooking important information. By using it, you will contribute to efficient preparation of your returns.

This engagement is for tax preparation only. We will perform accounting and bookkeeping services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations or other irregularities. 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, fraud, or other illegal acts we discover. Additional services, such as tax consultation, representation, bookkeeping and accounting will be separate engagements and billed separately.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

Our fees are based on the amount of work we do including the number and type of forms, schedules and worksheets prepared, the overall complexity of the returns and any research necessary to accurately complete your returns. Fees are not based on your income or your refund. We may ask some clients for a down payment on their work and these retainers are considered earned upon receipt. Invoices will be presented upon completion of the returns and taxpayer agrees to pay for the services performed at that time. No returns will be released or filed without payment in full. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (30) days and any checks returned for any reason will result in a collection fee of \$30.00.

Tax returns are subject to review by various taxing authorities. Should an examination of your return occur, Tropical Tax Solutions can be retained to consult with and/or represent you. In the unlikely event of a preparation error on our part we will correct the error at no cost to you and pay any penalties and interest associated with that error. Any additional tax owed would remain the responsibility of the taxpayer.

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 the accuracy and completeness of your return. We will retain 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 2019 tax returns will conclude with the delivery of the completed returns to you (if paper-filing), or your signature and our subsequent submittal of your tax return (if e-filing). If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities.

Remember to review all tax return documents carefully before signing them as you are declaring, under penalty of perjury, that you have examined the return and accompanying schedules and statements and that you believe them to be true and correct and accurately list all amounts and sources of income received during the tax year.

We appreciate your confidence in us and look forward to serving you, your family and your friends for years to come.

Thank you for your continued business.

Sincerely,

*Jerry Gaddis*

**Jerry Gaddis EA MBA**

Tropical Tax Solutions

[www.TropicalTax.com](http://www.TropicalTax.com)

305.451.4829 - Florida Keys Office

863.293.4829 - Central Florida Office



*A Forbes Top 100 must-follow tax twitter account!*

To affirm this letter accurately summarizes your understanding of the arrangements for this work, please sign below. (Both spouses must sign for preparation of joint returns.)

\_\_\_\_\_  
Taxpayer

\_\_\_\_\_  
Spouse

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

For Tax Year (s): \_\_\_\_\_



## PRIVACY POLICY

Your privacy is important to us. Please read the following privacy policy.

We collect nonpublic personal information about you from various sources, including:

- Interviews regarding your tax situation
- Applications, organizers, or other documents that supply such information as your name, address, telephone number, Social Security Number, number of dependents, birthdates, income, and other tax-related data
- Tax-related documents you provide that are required for processing tax returns, such as Forms W-2, 1099R, 1099-INT and 1099-DIV, and stock transactions

We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as requested by our clients or as required by law.

We restrict access to personal information concerning you, except to our employees who need such information in order to provide products or services to you. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your personal information.

This year we are also providing you with a secure data portal to exchange information in an effort to help protect your privacy. The portal can be accessed from our website or you can call the office for assistance.

If you have any questions about our privacy policy, please contact us.

Sincerely,

*Jerry Gaddis*

**Jerry Gaddis EA MBA**

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## YOUR ENGAGEMENT WITH TROPICAL TAX SOLUTIONS:

**Yes**   **No**

- |                          |                          |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Do you find the organizer useful?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you read and signed the attached engagement letter?                     |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you read the attached privacy policy?                                   |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you using our secure data portal to exchange information?                |
| <input type="checkbox"/> | <input type="checkbox"/> | Would you like a paper copy of your completed return?                        |
| <input type="checkbox"/> | <input type="checkbox"/> | Would you like to meet with Jerry to review your completed return?           |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you know what an Enrolled Agent is?                                       |
| <input type="checkbox"/> | <input type="checkbox"/> | Would you subscribe to a free monthly e-newsletter?                          |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you follow us on Twitter (@TropicalTax)                                   |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you on LinkedIn?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Are you on Facebook?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Do you have a friend, family member or colleague who could use our services? |

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name and contact info

### How did you learn about us? (mark all that apply)

- Brochure/postcard
- Dave Ramsey
- Online search
- Public appearance
- Radio advertisement
- Referred by current client
- Social media
- Word of mouth
- Other (please explain) \_\_\_\_\_

Client signature/date: \_\_\_\_\_