



Hope you are well and enjoying the holiday season. We are gearing up for the 2022 tax season.

Please sign this engagement letter if you will be working with us for your 2022 tax preparation. We need this letter signed in order to prepare your tax return. Please return to us by January 15<sup>th</sup> to reserve a spot.

We have also enclosed a tax organizer for you. Please be sure to fill it out. The tax organizer should be returned to us with your tax documents when complete.

This letter is to confirm our understanding of the terms of our agreement and outline the nature and extent of services we will provide. Based upon the information you furnish to us; we will prepare your Federal and applicable state income tax returns for 2022.

We will not audit or verify the data you submit to us, although we may ask you for clarification when necessary. All the information you submit to us will, to the best of your knowledge, be correct and complete and include all information necessary for the completion of your tax return.

We will also prepare 2023 estimated tax vouchers if required, based on your income and withholding taxes for 2022. If you anticipate a substantial change in income or withholding taxes for 2023, please indicate on the tax organizer. We will then determine whether an adjustment should be made to your tax estimates.

Your returns are subject to review by the taxing authorities. Any items that may be resolved against you by the examining agent are subject to certain rights of appeal. In the event of an examination, we will be available upon request to represent you, or to review the results of any examination. Fees will depend upon the scope of the engagement.

Our tax preparation fees include basic tax letters you may receive from the IRS or Vermont Department of Taxes during the year. The charges for our tax preparation services are based upon the complexity of the returns.

76 Pearl Street, Suite 204  
Telephone: 802-878-0990

Essex Junction, VT 05452  
Fax: 802-419-5085

Website: [www.sheltratax.com](http://www.sheltratax.com)

You have the final responsibility for your income tax returns. Please review them carefully before you sign them.

The privacy client information has always been important to us, and we have always been bound by professional standards of confidentiality. However, we are required by law to formally inform you of our privacy policy.

We collect nonpublic personal information about you that is provided by you or obtained by us with your authorization. This information may come from various sources, including information we receive from personal interviews, tax organizers, worksheets and other documents necessary to provide professional services to you.

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

As always, contact us if you have any questions.

Sincerely,



Diana J. Sheltra, EA, CFE  
Enrolled Agent  
Certified Fraud Examiner

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Date