

Burr Business Service Client Engagement Document

I, _____ have engaged Burr Business Service (BBS) to prepare my Individual (1040) Federal and State of Nebraska (1040N) Income Tax Returns for the year 2017. Please note that we only do Nebraska returns unless otherwise engaged to do a different state by you the client. I state that, to the best of my knowledge and belief, it is my responsibility to provide BBS with true, correct and complete information required to complete my tax returns. I will retain for four years all the documents required to substantiate the amounts of income and deductions on my returns. I have attached all forms, W-2s, 1099s and written summaries.

1. I have provided true, correct and complete information regarding amounts I have presented to BBS to claim as tax deductions. I will retain all written documentation supporting the amounts, including my logbooks and receipts. Should a question arise regarding the interpretation of the tax law on your tax return, BBS will use professional judgment in resolving the issues. BBS does not keep the original documents. They are always returned to the client. Charity documentation is the client's responsibility.

2. I understand that because taxing authorities may examine (audit) the returns, all of my documentation should be retained to support the information I provided to BBS. I also understand that if an error on my part is discovered at audit, I am responsible for the additional tax, penalty and interest that may be imposed on returns because of incorrect amounts, late filed returns or underpayment of tax.

3. I understand that BBS will not audit or otherwise verify any information that I provide. BBS may require clarification or additional information. BBS is not responsible for disallowed deductions or the inclusion of additional unreported income or any resulting taxes, penalties or interest.

4. I understand that I will be charged an additional fee if BBS is asked to assist or represent me in a tax audit, examination, letter or IRS notice inquiry. I understand that in the event of a preparer error, I am responsible for additional tax that may be due.

5. I will contact BBS immediately if I discover additional information that will lead to a change on my return, or if I receive any correspondence from the IRS or state taxing authorities.

6. If you have an account, retirement account, or business interest or property with a value over \$10,000 in a foreign country, or a foreign business ownership (not through a mutual fund) please let us know as some special rules will apply to you. There are *substantial* penalties for failure to disclose these items. I am responsible for meeting any foreign country income tax or other foreign country reporting requirements. We do not file the Fin Cin 114 filing will be client's responsibility.

7. I understand that it is the policy of BBS to put all formal tax advice in writing. I will not rely upon any unwritten advice because it may be tentative, incomplete or not fully reviewed.

8. **I understand that BBS fees will be due and payable upon completion of these returns.** Additional services will be billed and paid for when completed unless a retainer is requested. BBS services will conclude upon delivery of the completed income tax returns discussed above or upon our suspension of services or resignation from the engagement.

9. I will allow the above preparer to discuss my federal return with the IRS.

10. I understand that that BBS will not be filing any 990Ts for any K-1 inside an IRA.

11. If there are other services or tax returns that I expect BBS to prepare, I will specify them on the back of this page. A full copy of BBS *Privacy Policy* and *Record Retention Policy* is posted on our website. Please request a hard copy if you would like one.

12. I understand if all of my information is not dropped off by April 1, 2018, we engage Burr Business Service to file an extension on our behalf.

13. I understand all refundable tax credits will require answering of additional questions to comply with due diligence on the part of Burr Business Service.

The terms described in this document are acceptable, are hereby agreed to, and shall remain in effect until terminated by either party in writing.

Accepted by _____ **Date** _____