



P. O. Box 4662  
Mooreville, NC 28117-4662  
(704) 799-3058 Phone  
(704) 799-3059 Fax

Tax Services

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone: \_\_\_\_\_

This Engagement Letter is to confirm the arrangements for our tax return preparation services. We will prepare your Individual and/or Business Federal and State Income Tax Returns for calendar year 2009 in accordance with the appropriate tax laws and regulations. Your return will be prepared solely from the information provided by **YOU!** For speedy completion of your taxes, please provide any information promptly to our office, if we ask for it. All information is kept confidential! **No one can get your information from us without your permission, except for a government agency following due process of law. A signed written request has to be received from you to Payroll, Inc. prior to the transmission of any information to a third party. There will be no exception to this rule.**

ALL TAX PREPARATION FEES ARE DUE AND PAYABLE AT THE TIME YOU PICK UP YOUR COMPLETED RETURN(S). THIS YEAR WE ENCOURAGE ANYONE TO PREPAY AT THE TIME OF THE INTERVIEW OR DROP OFF.

**TAX PREPARATION SERVICES are based on a fee schedule charged per form(s)/schedule(s) that are needed to complete your return(s).** Fee schedules are displayed in the front office. Additional charges may include: research basis of stocks/bonds or assets sold, NOL's, multi-state returns filed, and accounting for an entire year, tax consultation for estimated taxes, amended taxes for prior year, FAFSA reports, assist or representation in a tax audit, examination or inquire, which are identified separately on your invoice.

**OTHER SERVICES provided:** Accounting, payroll, business consultation, set up of new businesses, public notary, and QuickBooks © training or assistance. These services are billed at an hourly rate and paid on the day of the appointment. Consultation and representation fees are charged at \$100 per hour with a \$50 minimum fee.

**Minimum fee of \$50 for any letters we write to the IRS or any State Agency at your request in response to a letter from them.** We must have written authorization for any fax or e-mail requests from or to banks, schools, mortgage representatives, etc. There will be a \$50 minimum charge, payable before we transmit the requested information.

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Occasionally we make mistakes, please forgive us for being human. Be courteous and let us know if you receive **any letters from the government**. We do correct returns with errors for **free** and pay any penalties, **if we are at fault**. However, **we are not responsible to pay any taxes owed**.

**PLEASE REVIEW YOUR RETURN(S) CAREFULLY BEFORE SIGNING AND FILING THEM.** If you have any questions, please call me. **THANK YOU** for allowing us to serve you this year! **WE GREATLY APPRECIATE YOUR BUSINESS!** This Engagement Letter will serve to apply to all future years unless the agreement is terminated or amended in writing by taxpayer (you) or preparer (Payroll, Inc.).

Sincerely,

*Gwen B. Moore*  
Gwen B. Moore, CPP, ARA  
President



P. O. Box 4662  
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 Phone (704) 799-3058  
 Fax (704) 799-3059  
 email: [gwen@payrollinc.com](mailto:gwen@payrollinc.com)

**Payroll, Inc. is not responsible for providing any of the deductions taken on my tax return(s). I have provided this information from my own records and I have proof of my deductions and income. I (we) give our permission to prepare my (our) tax return(s) and I (we) have read, understood and agree to the terms of this Engagement Letter and I (we) have read the Privacy Policy Act of this form on the attached sheet.**

\_\_\_\_\_  
**Taxpayer** \_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Spouse** \_\_\_\_\_  
**Date**

**NOTE: BOTH MUST SIGN THIS DOCUMENT, IF MARRIED (Exception: Surviving Spouse)**

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone 1-800-366-4484, or by e-mail to: [complaint@tigta.treas.gov](mailto:complaint@tigta.treas.gov)



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## **PRIVACY POLICY**

It has been the policy of Payroll, Inc. to keep all information that we collect from you, confidential from all sources. We restrict access to all nonpublic personal information about you to members of our firm who need to know that information to provide services to you. We do not collect nonpublic personal information from the following sources:

- Information we receive from you on tax preparation organizers, worksheets, Federal and State tax reporting forms, and from other documents we use in tax preparation or other financial and related services.
- Information about your transactions with us, our affiliates, and others.
- Information we may receive from outside agencies such as banks, creditors and brokerage houses.

We do not disclose any nonpublic personal information about our clients or former clients, except as permitted or approved by you in writing as listed below:

- Requirements to comply with federal, state or local law.
- Requirements to comply with national, state or local licensing rules.
- Requirements to disclose information in response to legal subpoenas.
- Items you permit or request us to disclose, as authorized by you in writing.
- Information that you authorize us to disclose by signing this engagement letter to electronically file your tax return, when applicable.
- Information that you authorize us to disclose by signing this engagement letter, which discloses that you are our client, without disclosure of financial or other personal information.

I have read, understand, and accept the conditions of the engagement letter and privacy policies discussed above.

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

Date \_\_\_\_\_

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