





**ROSSMAN TAX SERVICE 2023 BUSINESS ENGAGEMENT LETTER**

Dear Client,

Due to IRS and our insurance company regulations, we request that you read the following, sign, and date. If you are filing a Business Tax Return, the Officer/Partner who is signing this Engagement Letter attests that all parties in the business have reviewed this engagement letter and agree to the Terms of the Engagement for the preparation of the 2023 Business Tax Return.

We (I) hereby attest to the following:

- 1) All information provided in this business client information sheet is correct and we have provided current banking information.
- 2) We understand that if we are having Sales Tax or Payroll prepared by Rossman Tax Service we are responsible to meet all deadlines and Rossman Tax Service is not responsible for any penalties incurred due to the late filing of these forms. We acknowledge receipt of the annual calendar for all deadlines for Sales Tax & Payroll.
- 3) We (I) have provided a Profit & Loss Statement and a Balance Sheet that are required to prepare for 2023 Business Tax Return.
- 4) We (I) are responsible to have the required information for the Preparation of the Corporation Return to Rossman Tax Service by January 15<sup>th</sup>.
- 5) We (I) are aware that the NYS Corporate Franchise Fee will be automatically withdrawn from our bank account.
- 6) We (I) have adequate documentation to support the income & expenses listed on the Business Tax Return.
- 7) We (I) understand that Rossman Tax Service will not be held responsible for any errors on the business tax return due to client omissions or incorrect information on the business client information sheet and that an additional fee will be incurred to make corrections.
- 8) We (I) understand that the Officers/Partners are responsible for any tax liability on the Business Tax Return.
- 9) We (I) are responsible for the Business Tax Return and payment of any balance due to the IRS or New York State by March 15<sup>th</sup>.
- 10) In the event of a discontinuance of the Corporation/Partnership and Rossman Tax Service is the representative of the Corporation/Partnership. If there is potential information that may be harmful to one of the Officers/Partners, Rossman Tax Service will be obliged to divulge such information to the other Officers/Partners. Rossman Tax Service reserves the right, where there is a conflict of interest between the Officers/Partners and Rossman Tax Service to request that the Business client seeks accounting advice elsewhere.
- 11) We(I) understand that it is our(my) responsibility to have reviewed the Business Tax Return, Transmittals, and bank account information before signing the e-filing forms with the preparer and are aware of the content of the Business Tax Return and whether the Business is receiving a refund or if the Business has a balance due.
- 12) All services must be paid in full before E-Filing.
- 13) **NO POST-DATED CHECKS WILL BE PERMITTED. There is a \$50 Bounced Check Fee.**
- 14) One business taxpayer copy will be given each year upon payment. Any additional copies of Tax Returns will require a \$25 fee.
- 15) All work papers and prepared business tax returns are the property of Rossman Tax Service. If the return is not prepared by us, we will return to the business client all of their documents. Not our work papers or tax returns.
- 16) We (I) understand that if requested by IRS or State, we (I) will produce receipts and documentation to substantiate income and deduction. I further understand that I should keep records of income and receipts for a minimum of 7 years.

**I (We) agree to and understand that by signing this engagement letter, I will submit my tax information no later than January 25, 2024. If I am not able to submit my tax information by this date, I understand that I must complete a Business Extension Request Form and pay the \$75.00 Non-Refundable Business Extension Request Fee by February 1, 2024. I also understand if Rossman Tax Service prepares my Personal Income Tax Return, I must also submit A Personal Extension Request Form and pay an additional Non-Refundable \$50.00 for the personal extension request fee. I also acknowledge and understand that the extension only gives me additional time to file my tax return, if I owe money to the government, for corporate tax returns it is due and payable no later than March 15, 2024, and personal tax returns are due and payable no later than April 15, 2024. THIS ENGAGEMENT IS LIMITED TO THE PREPARATION OF BUSINESS TAX RETURNS. ADDITIONAL SERVICES SUCH AS PROJECTIONS OR GOVERNMENT EXAMINATIONS WILL INCUR AN ADDITIONAL CHARGE. WE (I) ALSO ACKNOWLEDGE THAT PAYMENT IS DUE UPON COMPLETION OF THE BUSINESS TAX RETURN AND THAT ONCE PAYMENT IS MADE, THE FEE FOR SERVICES RENDERED IS NONREFUNDABLE.**

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Business Name

Date

Signature