

Pal Associates Inc.
Tax & Accounting Services
Committed to Quality and Confidentiality®

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Dear Client:

This letter is to confirm and specify the terms of our commitment with you and to simplify the scope of the services provided to you. In order to ensure an understanding of our joint responsibilities, we ask all clients for whom returns are being prepared to confirm the following:

We will prepare your federal and requested state(s) income tax returns for the relevant Tax Year using information provide by you. We will not be able to audit or verify the data you submit, although it may be necessary to ask you for details of some of the information. We will provide you an organizer and/or worksheets to guide you in gathering the necessary information on request. Your use of such forms will assist you in keeping related information from being overlooked.

It is your responsibility to provide all the information required to prepare accurate and complete tax returns in a timely manner. It is recommended that the client provide photocopy, scan-copy using E-mail or fax all required documents. You should retain all the supporting documents, including canceled checks, receipts and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority.

Keep in mind for business returns (corporations, LLC, and partnerships) that management is responsible for the proper recording of transactions in the books of accounts, for the protection of assets, and for the significant accuracy of the financial records. Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations or other irregularities, should any exist.

You have the final responsibility for your income tax returns regardless of how they are filed (paper or e-file), and, therefore, you should review them carefully before you sign them or allow us to electronically process them on your behalf. We will use professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.

If an extension of the time to file is required, you must pay any tax that may be due with the return in questions with the extension request. Any tax amounts not paid by the filing deadline are subject to interest and late payment penalties when those amounts are actually paid. Due to increasing regulations regarding online and other direct payments we may be unable to process these on your behalf. The law provides various penalties that may be imposed when taxpayers understate their tax liability. If you would like information on the amount or the circumstances of these penalties, please contact us.

In addition to US Citizen and green card holders, we specialize in preparing tax returns for H1B/L1/F1 and J1 visa holders and their spouse/dependents. If you are non-resident and/or do not meet substantial presence test (did not stay long enough >183 days in USA on certain VISA type), please inform us so we can provide you an available options for you and file your tax return properly to get maximum tax benefits. If you need assistant to apply for ITIN – Individual Tax Identification Number for your spouse and/or dependents along with your Tax return, please let us know and we will assist you with nominal fees. The Final decision to issue ITIN remains with IRS.

The returns may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred. Our fee for these services will be based upon the amount of time required at standard billing rates plus Out-of-pocket expenses. All invoices are due and payable upon presentation.

If you request an estimate we will provide you non-binding estimates based upon verbal information provided by you. Due to unanticipated or changed situation, it may affect the original quoted fees. Once you agreed and once we have all required information via e-mail, fax or in-person, we will start working on your tax return. Once we share a draft copy of your tax return with you, you will be liable for tax preparation fees, even If you do not file your return with us.

Once we finalize the return and have necessary approval and payment, we will E-file or Paper file your return with IRS. If it is E-file, we will inform you once E-file is accepted. We will send you a signed copy of tax return for your future reference.

We are committed to Quality and Confidentiality. For any reason, if you are not satisfied with our service, please let us know and we will work with you to resolve your dissatisfaction. You shall not or be a cause to smear the image or trademark of Pal Associates Inc. by quoting Pal Associates Inc. or any of its employees by writing or publishing offensive messages on the Internet, blogs or any other public forum. You understand that such step by you would give every right to Pal Associates Inc. to file a lawsuit on you.

Under penalty of perjury, we affirmatively confirm that unless authorized by law, we would not disclose without your prior consent, your personal or tax return information to any third party for purpose other than preparation and filing of your tax return.

We want to express our appreciation for the opportunity to work with you.

Sincerely,
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I read and understand the terms & conditions of Pal Associates Inc. Agree Not Agree