



# Family TAX OFFICE

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## Engagement Letter

*Family TAX OFFICE* will prepare your income taxes using all legally required forms, based on the information you provide.

*Family TAX OFFICE* invites you to walk in, drop off, upload to our secure portal, mail in using priority mail or schedule an appointment to complete your tax preparation in one visit.

*Family TAX OFFICE* accepts original, copies, or digital documents by the following methods: in person in our office, by USPS, UPS or FED EX, uploaded to our secure client portal found on our website. Please provide **ALL** digital copies in pdf format, there may be additional fees if jpeg or image files are received.

*Family TAX OFFICE* abides by WISP (written information security plan) to protect your sensitive and confidential information from any possible threats. Please do NOT send attachments, photos or other mediums in regular email as it is not secure. Information received via regular email will be deleted by our office for your protection.

*Family TAX OFFICE* your invoice is due and payable upon completion of your returns. Receipt your paid invoice, will allow us to release the returns for your review. Once approved for filing, we will obtain your wet signatures or electronic signatures. Electronic signatures requires a valid email, KBA (knowledge based authentication) you will need to answer the question to identify you for signing. Incorrect answers will lock you out of signing and you will need to contact us to reissue a new signature link. Additional links may result in a fee.

*Family TAX OFFICE* communicates by email and secure client portal. It is your responsibility to monitor junk or spam folders. Please be sure and add us to your safe sender list. Time sensitive electronic signatures are requested from Wolters Kluwer. "A document from Wolters Kluwer is available for you to sign" a secure 3<sup>rd</sup> party, so please be sure and check junk or spam often.

Returns are E-Filed **ALL** transmitted returns are monitored until accepted by the agencies. We will notify you if the returns are rejected for any reason that will require information from you. If you would like to receive notification of your accepted returns, please notify our office.

**ALL** documents and information must be received by our office **BEFORE** we can begin working on your tax returns, and no later than MARCH 24 2024 to ensure a timely filed return. If any information or documents are not received by the MARCH 24 2024 deadline we may have to file an extension which will be an additional fee. Extensions DO NOT extend the tax due. ALL balance due taxes are due by April 15 2024 *Corporate return documents are due by FEBRUARY 24 2024 to be filed by March 15 2024* **AFTER** the start of your returns we discover missing documents or information, we will reach out to you to request the information, and **NO** work will be restarted until **ALL** missing information is received. There may be additional fees to rework the returns once the missing information has been received by our office.

I (we) agree to engage *Family TAX OFFICE* to prepare our individual (business) returns for tax year 2023. We have/will provided ALL documents and information and have/will pay the retainer fee of \$\_\_\_\_ I understand additional services such as tax planning, audits, help with letters, etc. are not part of this engagement and are available services for a fee.

Taxpayer Signature \_\_\_\_\_ Date \_\_\_\_\_

Spouse Signature \_\_\_\_\_ Date \_\_\_\_\_

**(760) 870-4441 text    (858) 301-6100 office**  
14231 Garden Rd Suite 11 Poway Ca 92064  
**www.FamilyTaxOffice.com**