

Engagement Letter and Privacy Disclosure

To: Michael S. Plemich CPA

I (or "we" for all items if a Joint return) have engaged your firm to prepare my individual (1040) Federal and Illinois (or other) State income tax returns for the year ended 12/31/21. I understand that it is my responsibility to provide you with all of the information required to complete my tax return. In that regard, I state that, to the best of my knowledge and belief:

1. I have provided true, correct, and complete information regarding my income as listed on the attached Forms W-2, 1099 and/or attached written summaries. I understand that it is my responsibility to provide all of the information necessary to complete the returns. I will retain for **four** years all of the documents, receipts, cancelled checks and other records required to substantiate the items of income and expense claimed on my return.
2. I have provided true, correct and complete information regarding amounts I have presented to you to claim as tax deductions and I have maintained written documentation supporting all amounts including logbooks and receipts. I understand that if a question arises regarding the interpretation of tax law, and a conflict exists between the tax authorities' interpretation of the law, and other supportable positions, that you will use your professional judgment in resolving the issues.
3. I understand that because taxing authorities may examine (audit) the returns, that documentation should be retained to support the information provided to you, especially business travel and entertainment deductions, business use percentage of autos and other business assets and barter activities, and that penalties may be imposed on returns that are late, underpaid or incorrect.
4. I understand that you will not audit or otherwise verify any information, that you may require clarification or additional information, that you are not responsible for disallowed deductions, or the inclusion of additional unreported income or any resulting taxes, penalties or interest.
5. I understand that in the event of preparer error, I am responsible for the additional tax that may be due, but that the extent of your responsibility is to pay for any penalty that the IRS or Illinois Department of Revenue (or other states filed) may assess.
6. I will contact you immediately if I discover additional information that will lead to a change in my return, or if I receive any notices or letters from the IRS or Illinois Department of Revenue (or other states filed).
7. I understand that your bill will be due and payable upon completion of these returns, and that additional services will not be performed until the bill is paid for.
8. I understand no extensions of time to file any return will be done unless I agree to it.
9. I have had Qualified Health Insurance for myself and all dependents to be listed on this return for all 12 months of 2021 except as follows: _____
10. **I have no foreign financial accounts and did not receive a distribution from, or was a grantor of, or a transferor to, a foreign trust except as follows:** _____
11. **I have received the following Economic Impact Payment(s) during 2021 of:** _____ **IRS Letter #6475 is attached.**
12. **At any time during 2021, I did not receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency. If you did, please explain:** _____
13. **I have received the following advanced payments of the Child Tax Credit during 2021 of:** _____ **IRS Letter #6419 is attached.**

Privacy Policy

It has always been my policy to keep all information that I collect from you as confidential from all sources. I do collect nonpublic personal information about you from the following sources:

- Information I receive from you on tax preparation organizers, worksheets, Federal and Illinois (or other) State tax reporting forms, and from other documents I use in tax preparation.
- Information I receive from outside agencies such as banks and brokerage houses.

I do not disclose any nonpublic personal information about my clients or former clients, except as permitted, required, or approved by you in writing or email as listed below:

- Requirements to comply with Federal, Illinois (or other) State or local law.
- Requirements to comply with national, Illinois (or other) State or local licensing rule.
- Requirements to disclose information in response to legal subpoenas.
- Items you permit or request us to disclose as authorized by you in writing including email requests.
- Information that you authorize me to disclose by signing this engagement letter, which disclose that you are my client, without disclosure of financial or other personal information.

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

Client Signature _____ Date _____, 2022

Additional Signature, if joint return _____ Date _____, 2022