



ESTATE TAX ENGAGEMENT LETTER

Tax year: _____

Estate name: _____

Executor / Executrix : _____

Street address: _____

City, State, zip: _____

Phone number: _____

Email address: _____

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements.

Preparation of Federal and Requested State Income Tax Returns:

- Returns are prepared from information that you provide to us.
- A tax organizer is provided to help you gather the necessary information. You may download from our website at www.steadmantax.com under the download tab.
- Your use of the organizer will assist in ensuring that all pertinent information is included.
- We will not audit or otherwise verify the data you submit, but may request clarification and supporting documents for certain items.
- All returns will be prepared for electronic filing unless you instruct us otherwise.

Your Responsibilities:

- Provide all the information required for the preparation of complete and accurate returns.
- Retain all the documents, canceled checks and other data that support the amounts claimed in the return for at least three years after the return is filed (in certain situations, it will be necessary to maintain documents for longer periods).
- Review all returns carefully before you sign them or authorize us to file them electronically on your behalf.
- You have the final responsibility for your income tax returns.
- Discuss with us your requirements for filing state income tax returns.

Our Fees:

- Tax return preparation fees are typically based upon the forms filed, or on a combination of the time required for preparation, out-of-pocket expenses, and the complexity of the issues involved in your return.
- If requested, we can provide an estimate of the total fee before beginning our work.
- Invoices for tax return preparation are due and payable upon delivery of the return.
- If you discover that you have omitted information that should be included in your return after the return has been completed, please notify us immediately. Depending upon the item omitted, there may be an additional fee for making corrections.
- Preparation fees do cover limited assistance and consultation during the year.
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities.

Electronic Data Communication and Storage and Use of Third Party Service Provider

In providing our services to you, we may communicate by facsimile transmission, send data over the Internet, store electronic data via computer software applications hosted remotely on the Internet (Cloud), or allow access to data through third-party vendors' secured portals or clouds. Electronic data that is confidential may be transmitted or stored using these methods. We may use third-party service providers to store or transmit this data, such as providers of tax return preparation software. In using these data communication and storage methods, our firm employs measures designed to maintain data security. We use all reasonable efforts to keep such communications and data access secure in accordance with our obligations under applicable laws and professional standards. We also require all of our third-party vendors to do the same and use only secured portals or secured cloud hosting that maintains data physically within the United States. You recognize and accept that we have no control over the unauthorized interception or breach of any communications or data once it has been sent or has been subject to unauthorized access, notwithstanding all reasonable security measures employed by us or our third-party vendors, and consent to our use of these electronic devices and applications and submission of confidential client information to third-party service providers during this engagement.

If the above mentioned services meet your satisfaction, please sign this letter and return it to our office along with your tax return data. If you do not consent to the Electronic Data Communication and Storage and Use of Third Party Service Provider, please do not sign this engagement.

Accepted by: _____
Taxpayer's Signature

Printed Name

Date: