

**Debbie R. White CPA, Inc.**  
**1680 S.W. 86<sup>th</sup> Street**  
**Oklahoma City, OK 73159**  
**(405) 682-1829**  
**drwcpatax@gmail.com**

**January 1, 2024**

Dear Client:

This letter is to confirm and specify the terms of our engagement for tax preparation services. It will define the nature and extent of the services I will provide. By signing this engagement letter and filing a tax return prepared by me, you are accepting the terms of our engagement as described in the following paragraphs.

I will prepare your 2023 federal and requested state income tax returns from information that you will furnish me. I will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. I may furnish you with questionnaires and/or worksheets to guide you in gathering the necessary information. Your use of such forms will assist in keeping pertinent information from being overlooked.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, canceled checks, 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. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them.

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover errors or other irregularities, should any exist. I will render such accounting and bookkeeping assistance as determined to be necessary for preparation of the income tax returns.

I 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, I will resolve such questions in your favor whenever possible.

The law provides various penalties that may be imposed when taxpayers understate their tax liability. Your returns may be selected for review by the taxing authorities. In the event of such tax examination or other taxing authority contact, we can respond or represent you. However if you request my representation, additional fees will be incurred based on our standard billing rates for the time and expenses incurred. Our fee for these services will be based upon the amount of time required at standard billing rates, **\$ 300.00 per hour**, plus out-of-pocket expenses. All invoices are due and payable upon presentation. By signing engagement letter both parties are in agreement the exclusive jurisdiction for resolving disputes related to this Agreement, shall be in accordance with the laws of the State of Oklahoma.

**THE BACK OF THIS LETTER MUST BE SIGNED AND RETURNED TO OUR  
OFFICE WITH TAX INFORMATION**

We must receive all information to prepare your return by March 21, 2024, to ensure that your return will be completed by April 15, 2024. Returns for which information is received after March 21, 2024, will be completed as time allows. **Although a reasonable effort will be made to complete your returns by April 15, 2024, we cannot commit to completion by deadline, an extension will be filed, with an additional preparation fee in the amount of \$ 75.00 will be charged for the preparation and e-filing of extension.**

**E-FILE**

When your return has been completed, you will be contacted to come into our office to sign the e-file authorization forms, pay tax preparation fee and review your returns prior to E-Filing. Upon receipt of your returns, please review returns for completeness and accuracy. We must be notified within 24 hours of any changes. If we do NOT hear from you within 24 hours, it will be assumed, per your acceptance of this engagement letter, that there are no changes or corrections to your returns and we are authorized to E-File returns. If you want to make changes to your return after it has been e-filed, we must file an amended return for which you will be billed an additional charge. If you receive correspondence from any taxing authority and want us to respond either to you or the tax agency, you will be billed for our time at our regular rates.

*By signing below and filing the completed tax returns, you are indicating your acknowledgement and acceptance of the terms of our engagement as stated above.*

*Sincerely,  
Debbie R. White CPA*

<b><u>CLIENT SIGNATURE REQUIRED</u></b> (Both husband and wife must sign for preparation of joint returns)	
_____	Date: _____
<b>Name Printed</b>	
_____	
<b>Signature</b>	
_____	Date: _____
<b>Name Printed</b>	
_____	
<b>Signature</b>	

**TAX RETURN STATUS NOTIFICATION OPTIONS**

*Please indicate below how you would like to be notified regarding questions we may have or upon the completion of your personal tax returns.*

**Email/Phone #:** \_\_\_\_\_

**\*\*\*\*\* ADDITIONAL TAX INFORMATION \*\*\*\*\***