



Engagement Letter and Privacy Policy

❖ **Preparation of your federal and/or state tax return(s):**

Thank you for choosing Monroe Tax Connect to assist you with filing your taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare and submit your federal and/or state tax returns for the current tax year and/or prior tax years, if requested by the client. Our responsibilities do not include the preparation of any other tax returns that may be due to any taxing authority.

❖ **Client Communications**

We will prepare your federal and state income tax returns based on the information you furnish to us. It is your responsibility to provide the information required for the preparation of a complete and accurate return. You should keep all documents, canceled checks, receipts, and other data that support your reported income and deductions. They may be necessary to prove the accuracy and completeness of the returns to a taxing authority. We will not audit or otherwise verify the data you submit to us, although we may ask you to clarify some of it. To timely file your tax returns, we require all necessary information no later than 3 days prior to the tax filing deadline.

Our work will not include any procedures to discover defalcations or other irregularities. The only accounting or analysis work we will do is that which is necessary for the preparation of your income tax returns.

Your returns may be selected for audit by a taxing authority. Any proposed adjustments are subject to appeal. In the event of a tax examination, we can arrange to be available to represent you. Such representation will be a separate engagement for which an engagement letter will be provided to you. Fees and expenses for defending the returns will be invoiced in accordance with the terms we agree to for that engagement.

❖ **Fees/Prices**

Any estimate we give is based upon the information you initially provide to us. Actual fees may vary as circumstances change and/or newly corrected information is made available.

Tax Preparation Services: Tax preparation fees are based on the complexity of your return and the forms required.

➤ **Individual Tax Preparation:** Starting at \$195

Includes preparation and electronic filing of your individual federal and/or state tax return.

Additional Forms & Complexity Fees: Additional fees may apply for returns requiring extra forms, schedules, or complexity, including but not limited to:

- **Schedule C (Self-Employment Income):** +\$35
- **Schedule E (Rental / Pass-Through Income):** +\$40
- **Form 8949 (Capital Gains/Losses, Stocks, Cryptocurrency):** +\$40
- **Form 8829 (Home Office Deduction):** +\$35
- **Multi-State Returns:** +\$15 for each additional state after the first

All applicable fees will be discussed with you prior to filing. All fees are due and payable before the completed tax return is released or electronically filed.

❖ **Optional Bookkeeping Services**

Monroe Tax Connect also offers optional bookkeeping and year-round financial support services. These services are not required for tax preparation and are provided under a separate agreement with separate pricing, if elected by the client.

❖ **Privacy Policy**

Your privacy is important to us.

We collect personal information, including but not limited to:

- Your name, email address, social security number, date of birth, credit card information, mailing address, and/or telephone number
- Employment and income information, bank account details, tax return information, and associated IRS filings.

This information is collected when you voluntarily sign up on the Client Portal or request information or services from us. Additional information may be gathered during your subsequent use of our services, or when we communicate with you via telephone, email, or other means.

We value your trust and confidence in us and want to assure you that your personal information is kept completely confidential. We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as requested by our clients or as required by law.

We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your personal information.

We will store your records, along with all supporting documents, in a secure location. Copies of your records and our work papers will be retained for up to seven (7) years, after which these documents will be destroyed.

❖ Opt-Out

You may opt out of receiving communications or services from Monroe Tax Connect at any time before your return is released to the IRS. Options for opting out include:

- Email: Send an email to info@monroetaxconnect.com with the subject line "Opt-Out."
- Text "Opt-Out" to (617) 798-4579

If you choose not to e-file your returns with our office, you are solely responsible for filing the returns with the appropriate taxing authorities. Please review all tax return documents carefully before signing them.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign and provide your full social security number in the space indicated.

Taxpayer's Printed Name

SSN

Taxpayer's Signature

Date Signed

Taxpayer's Email Address

Spouse's Printed Name

SSN

Spouse's Signature

Date Signed

Spouse's Email Address

Initials