

M. A. Kearney & Associates, LLC
Mary Ann Kearney, EA
P. O. Box 40325
Glen Oaks, NY 11004-0325

Thank you for choosing M. A. Kearney & Associates, LLC to assist you with your 2022 tax return. This letter confirms the terms of our engagement and outlines the nature and extent of the services we will provide.

We will prepare your 2022 Federal and State (in which you deem yourself a resident in 2022) tax returns. We will depend on you to provide the information we need to prepare complete and accurate returns. It is your responsibility to provide all the information required for the preparation of complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. An organizer is enclosed to help you collect the data required for your return. The organizer will help you avoid overlooking important information. By using it, you will contribute to efficient preparation of your returns.

The law imposes penalties when taxpayers underestimate their tax liability. Please call us if you have concerns about such penalties. If there is a balance due on either your Federal or State return, we will either send you a voucher for you to send a check, or can arrange for electronic withdrawal.

Should we encounter instances of unclear tax law or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt on your behalf, the alternative you select.

We will return your original records to you at the end of the engagement. You should securely store these records, along with all supporting documents, cancelled checks, etc, as these items may later be needed to prove accuracy and completeness of a return. We will retain copies of your records and our work papers for your engagement for seven years, after which these documents will be destroyed.

Our engagement to prepare your 2022 tax returns will conclude with the submittal and acceptance of your tax return. The IRS, as well as all states now requires that ALL tax returns be filed electronically.

No copies of tax returns, W2's, 1099's will be emailed or faxed to third parties unless a consent form, signed by you, is on file with our office

To affirm this letter correctly summarizes your understanding of the arrangements for this work, please sign this copy in the space indicated, and return with your organizer. **NO RETURNS WILL BE FILED WITHOUT THIS ENGAGEMENT LETTER SIGNED and RETURNED TO ME.**

We appreciate your confidence in us. Please call if you have any questions.

Sincerely,

Mary Ann Kearney, EA

Both spouses must sign for a joint return.

Accepted and Agreed:

Taxpayer: _____

Spouse: _____

Date: _____