



Corvid Tax, LLC

4701 SW Admiral Way #292

Seattle, WA 98116

www.corvidtax.com

206-915-9223

Date: _____

Letter of Engagement for Tax Services

Thank you for contacting Corvid Tax to assist you with your tax preparation and/or representation needs. The purpose of this letter is to outline the scope of services, and the fee arrangement and provide our policies and terms in order to complete your work in an efficient and professional manner. If you have any questions or concerns, please don't hesitate to contact us. Otherwise, please sign on the last page and return a copy to us. We must receive this signed letter before we can begin any work.

I. Scope of Services provided by Corvid Tax

The following services are included for all clients, and will be provided as needed:

- i. Provide informal tax advice and answers to tax questions.
- ii. Post Power of Attorney (form 2848) with Internal Revenue Service.
- iii. IRS record research and analysis to:
 - a. identify which, if any, tax filings may be missing and required.
 - b. gather wage & income records for any years which need to be filed.
 - c. analysis of any current balance(s) owed to determine years owed, where payments have been applied, amounts of principle, penalties and interest owed, and Collection Statute Date (CSED).and
 - d. determine IRS Collections status and urgency.
- iv. Informally review and advise on any letters or correspondence received from the IRS or State Agency while we are retained.
- v. Secure storage of electronic copies of case documents and returns prepared for at least 5-years past completion.

In addition to the above services, the fee quoted also includes the following specific services:

- i. Tax Form Preparation: Form _____ Year(s)_____
- ii. Collections Representation: _____
- iii. Audit Representation: Form _____ Year(s)_____
- iv. Other: _____



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For Tax Preparation cases, we will prepare all tax returns in accordance with the applicable tax laws and comply with industry best standards and practices. All tax preparation forms must be reviewed and signed by the taxpayer(s) before submission to the IRS.

For Collections and Audit cases which require direct contact with IRS personnel, we will:

- i. Manage all verbal and written communications with IRS personnel to the extent permitted by law and in the best interests of a successful resolution to your case.
- ii. Track IRS deadlines and clearly communicate all deadlines and expectations to you.
- iii. Perform all work deemed by us to be necessary and advisable to achieve the best possible resolution for your case.
- iv. Obtain your approval before entering into any final agreement on your behalf with the IRS.

II. Fee

In exchange for the services listed above, you agree to pay \$_____. This flat fee is anticipated to cover all work performed on your behalf and is based on information you have provided to us. Additional fees will not be charged unless additional work is needed or requested beyond what is set forth in this letter. For collections or audit cases that extend longer than 6-months, a continuation fee will be charged every 6-months to keep us on retainer. You will be notified in advance of any additional fees and will have the opportunity to approve or reject before any additional billable work is completed.

III. Client Responsibilities

It is your responsibility to provide all necessary information and documents in a timely manner. Each case is different, and we will work together to determine the list and scope of documents needed. For tax preparation and collections representation cases, you will generally be given an initial questionnaire and information checklist to complete. Your answers on the questionnaire along with other facts and circumstances will determine the extent of any additional info needed. Audit representation cases will begin with us reviewing the tax returns and audit paperwork and using the IRS letters to determine what info will be needed to respond. If we request information or documents that you do not have, or cannot provide in a timely manner, it is your responsibility to inform us of this as soon as possible. so that we can potentially come up with other advice or options.



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It is your responsibility to remain in contact with us and engaged in your case. You must provide us with at least two current methods to contact you (Phone numbers, Email, Text, etc.) and be responsive to requests and aware of deadlines. During our engagement, please notify us immediately if your contact information changes. If you send us information and do not receive a timely acknowledgement, it is your responsibility to follow up and confirm we received it.

You agree to pay all fees in a timely manner. New clients will be expected to make a down payment or pre-pay in full before any work will begin. All tax preparation fees must be paid in full before tax returns are submitted.

You acknowledge and agree that Corvid Tax, nor any agent, advisor, representative, affiliate, employee, director, partner, member, beneficiary, investor, servant, shareholder, trustee, or other person or entity acting on behalf of Corvid Tax has made any promises, representations or warranties regarding any specific outcomes for your case. This includes, but is not limited to, promises of obtaining refunds on tax returns, approval of tax settlements, reductions in taxes owed, or return of money or property seized by the IRS or State. We are retained as a professional tax service to achieve the best results possible based on the specific facts and circumstances of your case.

IV. Company Contact

Matthew Woare, EA will have primary professional responsibility on your account and is your point of contact. Our current contact information is:

Corvid Tax, LLC
4701 SW Admiral Way #292
Seattle, WA 98116
www.corvidtax.com
mwoare@corvidtax.com
phone: 206-915-9223

Additional methods of contacting us and sending information can be found on the contact page of our website: www.corvidtax.com/contact . Any updates or changes to our contact information will be posted on the website.



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V. Termination of Agreement

In the event you wish to terminate our services, you may do so at any time by notifying us in writing through mail or email. All fees paid are non-refundable once work has begun on your account.

Corvid Tax reserves the right to terminate the provision of services and/or representation in the event of non-payment of fees, non-responsiveness to information requests or deadlines, or other irreconcilable differences. You will be notified in writing prior to any termination.

VI. Document Retention

We will securely store an electronic copy of your file for a minimum of 5 years after completion of your work. This includes any tax returns and other forms we prepare and related documentation. We do not store every item you send us; additional documents we keep are saved at our discretion. We do not store paper documents and ask that you not send us any original documents that you may want to keep. Because of US Treasury and other regulations, we are prohibited from providing copies of your returns or any other personal information to any third party without the client's express written consent.

Thank you for this opportunity to work with you. By signing below, you are acknowledging that you have read, understand and accept the conditions of this agreement.

X Client _____

Date _____

X Client _____

Date _____



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VI. Privacy Policy

Keeping your information confidential and secure is our top priority. Your confidence in us is very important and you can trust that the information you provide will remain protected.

Corvid Tax, LLC collects personal financial information from our clients and prospective clients for the purpose of providing tax and other related services. We do not share this information with any outside person, government agency or company without the client's consent or as required by law. Information provided by prospective clients, who don't ultimately hire us, is not shared and will be deleted or destroyed.

Corvid Tax, LLC handles all information you provide with the utmost confidentiality and care. Access to nonpublic personal information about you is restricted to members of Corvid Tax who need to know this information in order to complete the work you have hired us to accomplish. Corvid Tax maintains physical, electronic, and procedural safeguards which comply with or exceed generally accepted federal and state regulations to guard your nonpublic personal information.

Absent a specific exception, Treas. Reg. section 301.7216 generally prohibits the disclosure or use of tax information without the client's explicit, written consent. In general, a "disclosure" of information involves a disclosure by the preparer of a client's return information to a third party.

Under section 7216, a tax return preparer is subject to a criminal penalty for "knowingly or recklessly" disclosing or using tax return information without consent. Each violation of section 7216 could result in a fine of up to \$1,000 or one-year imprisonment, or both. Internal Revenue Code section 6713, the companion civil penalty, imposes a \$250 penalty on a preparer for each prohibited disclosure or use of the return information.

Because of these rules we do not provide copies of tax returns or other information to any other third party without signed authorization from the client.