



**Pro Tax Inc.**  
110 N Mahan St.  
Ridgecrest, CA 93555

### **Engagement Letter**

Dear Client,

Thank you for choosing Pro Tax Inc. for your tax preparation needs. This engagement letter outlines the terms and conditions of our services to ensure a clear understanding between Pro Tax Inc. and you, our valued client. By signing this letter, you agree to the terms outlined below.

#### **Scope of Services**

Pro Tax Inc. will prepare your Federal and State income tax returns for the tax year \_\_\_\_\_. Our services include reviewing the documentation you provide, preparing the tax returns, and filing them with the appropriate tax authorities upon your approval and receipt of payment.

#### **Client Responsibilities**

You are responsible for providing Pro Tax Inc. with all relevant tax documents and information necessary to prepare your tax returns accurately and completely. This includes, but is not limited to, income statements, expense records, deductions, credits, and any other relevant financial information. Failure to provide complete and accurate information may result in delays or inaccuracies in your tax returns, for which Pro Tax Inc. will not be held liable.

#### **Fees and Payment Terms**

Our fees are based on the complexity of your tax return(s). **Payment in full** is required before we file your tax returns with the respective tax agencies. If you decide not to proceed with filing after signing this agreement, you agree to pay the full invoice for all work performed up to that point.

#### **Processing Time**

We estimate that preparing and processing your tax returns will take approximately 30 days from receiving all required tax documents. This timeline is an estimate and may vary depending on the complexity of your return or unforeseen circumstances. We will inform you of any significant delays.



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### **Termination of Services**

Either party may terminate this agreement with written notice. However, you remain responsible for paying all fees for services performed by Pro Tax Inc. before termination.

### **Contact Information**

**If you have any questions or need to provide additional information, please contact us at:**

**Office Phone # (760) 375-3222**

**Office Text # (760) 301-5558**

**Office Email: [team@protaxinc.us](mailto:team@protaxinc.us)**

***Please use the Pro Tax Office phone number and text number for official communications. We kindly ask that you not call or text our team members' personal phone numbers.***

Please review this engagement letter, sign below, and return a copy to us to confirm your agreement to these terms. We look forward to serving you.

Sincerely,

Amanda Bartel

CEO, Pro Tax Inc.

Client Acceptance

I, \_\_\_\_\_, have read and agree to the terms and conditions outlined in this engagement letter.

Client Signature: \_\_\_\_\_ Date: \_\_\_\_\_