

General Engagement Letter for Individual Tax Preparation

(Please see organizer form, attached)

**Northwest Tax Associates
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This letter is to inform you, herein the Taxpayer, of the services Northwest Tax Associates (NTA) will provide you, and the responsibilities you have in preparation of your tax return.

Tax Return Preparation. NTA will prepare your **2023 federal and state tax returns** based upon information you provide. Services for preparation of your return do not include auditing, examination, or verification or correction and revision of information provided by you.

- In the event your return is audited, you will be responsible for verifying the items reported.
- The tax return preparation fee does not include bookkeeping services.
- Fees charged for tax return preparation do not include audit representation or the preparation and review of materials to respond to inquiries or correspondence from taxing authorities.
- Assisting you with your compliance with the Corporate Transparency Act, including beneficial ownership information reporting, is not within the scope of this engagement.
- Preparation fees do cover limited assistance and consultation, not to exceed one half hour during the year in which your return is prepared.
- The engagement to prepare your 2023 tax returns terminates upon delivery of your completed returns and original documents to you. NTA recommends that you store your supporting documentation and copies of your tax returns in a secure place for at least seven years. You may be assessed a fee if you request copies from us in the future. NTA is not required to keep copies of your records for more than three years from the date they are completed.

Taxpayer Responsibilities.

- You, the Taxpayer, agree to timely provide us with accurate income and tax-deductible expense information and related documentation. If you receive additional or revised information after NTA begins working on your return, you are required to contact us immediately and provide us with such additional or revised documentation to ensure your completed tax returns contain accurate, current and relevant information.
- You represent and warrant that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, NTA will ask to review such documentation.
- You must be able to provide all written records of all items and information included on your return in the event you are audited by either the IRS or state or local tax authorities.
- You are required to review the return carefully before signing to make sure that all information contained on your return is current and correct.
- Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required for preparation of materially substantial or delinquent returns.

Privacy Policy. The nature of our work requires us to collect certain nonpublic, personal information about you from various sources. NTA collects financial and personal information from applications, worksheets, reporting financial statements, and other documents, data and forms, as well as interviews and conversations with our clients and affiliates. NTA may also review banking and credit information about our clients in the performance of our duties and the payment therefor. All such information NTA obtains about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. NTA restricts access to your confidential information to those within our firm and involved affiliates who have a reasonable need to know in order to provide you with services. NTA will not disclose your personal information to any third party without your express permission, except where required by law. NTA maintain physical, electronic, and procedural safeguards in compliance with state and federal regulations that protect your personal information from unauthorized access. Please contact us with any questions regarding our privacy policy.

Signatures. By signing below, you acknowledge and agree that you have read, understand, and accept your obligations and responsibilities and that you understand our responsibilities in preparing your tax returns as explained herein, and the following Terms and Conditions which are, by this reference, incorporated herein as though fully set forth. For a joint return, both taxpayers must sign.

<i>Taxpayer (sign and print name)</i>	<i>Taxpayer (sign and print name)</i>	<i>Date</i>
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Terms and Conditions

GOVERNING LAW; DISPUTES: This Agreement shall be governed by the laws of the State of Oregon. Venue shall be within Lane County, Oregon.

SEVERABILITY: In the event any portion of this Agreement should be declared to be invalid, then the remaining portions thereof shall remain in full force and effect and the Agreement shall be interpreted so as to carry out the original intent of the parties.

DELEGATION DISCLOSURE: NTA may, from time to time, outsource work using NTA's agents, representatives, temporary employees, independent contractors, outside vendors, professionals and service providers to perform some or all of the work for Client, in NTA's sole and absolute discretion. NTA remains responsible to the Client for all work performed by such NTA-employed outsource service providers.

CONSTRUCTION: The rule of construction that a written Agreement is construed against the party preparing or drafting such Agreement shall specifically not be applicable in the interpretation of this Agreement or any documents executed and delivered under this Agreement.

BINDING ON SUCCESSORS: This Agreement is binding on and will inure to the benefit of, and shall be binding upon, the respective heirs, legal representatives, successors, and assigns of the parties.

LIMITATION ON LIABILITY: In the event liability can be imposed on NTA, its employees, agents, affiliates, contractors attorneys or representatives, for any reason, under any legal theory, then Taxpayers agree that the aggregate liability of NTA, its employees, agents, affiliates, contractors attorneys or representatives, is limited to and shall not exceed the collective amount of money paid by Taxpayers to NTA during the sixty (60) days preceding the incident, act or omission on the party of NTA that gave rise to the complaint or the claim. This limitation on liability shall be binding on Taxpayers, their/its principals, agents, employees, legal and personal representatives, successors, heirs, assigns, and/or all persons who may otherwise claim by or through any of them. Taxpayers assume the risk of all losses greater than the amount of money paid to NTA during that sixty (60) day period. The parties agree that in the event any legal proceeding is brought to interpret or enforce the terms of this Agreement, neither party shall be entitled to recover attorney fees, litigation expenses, and/or other court fees, costs or assessments.