

MY TAX SPOT LLC

Tax Preparation Engagement Agreement

Template for electronic signature workflow; attorney review recommended before production use.

1. Scope of Services

My Tax Spot LLC will prepare the tax return(s) and related filing work identified in the accepted engagement based on information supplied by the client. Services outside that scope, including audits, notices, bookkeeping, amended returns, additional states, business filings, or advisory work, require a separate agreement or additional fee unless expressly included.

2. Client Responsibilities

The client is responsible for providing complete, accurate, and timely information; maintaining supporting records; reviewing the completed return; and asking questions before authorizing filing. My Tax Spot LLC may rely on information provided by the client without independently auditing or verifying every item.

3. Fees and Payment

Preparation fees depend on the complexity and services required. Additional forms, schedules, states, businesses, amendments, prior-year work, or other services may increase the fee. Payment terms should be communicated before filing.

4. No Guaranteed Refund or Agency Result

My Tax Spot LLC does not guarantee a refund amount, processing time, audit result, credit eligibility, or action by the IRS or any state taxing authority.

5. Electronic Communications and Secure Documents

Routine administrative communications may occur by email or text. Sensitive taxpayer information should be exchanged only through an approved secure platform. The client agrees not to send Social Security numbers, banking information, identity documents, or tax documents through ordinary website contact forms.

6. Authorization to File

The client must review the return and complete every authorization required by law before filing. IRS e-file authorizations such as Form 8879 are separate from this agreement.

7. Entire Agreement

This agreement and any signed addenda describe the agreed services. Electronic signatures may be used where permitted by applicable law and the chosen signature platform.

By signing, the client acknowledges that they have read, understood, and agreed to these terms.

Client signature

Date