

Dear Client of T.A.X.E.S.,

Your privacy is important to us. We are required by law to comply with specific data-sharing regulations. Please read the following privacy policy before moving forward.

We collect nonpublic personal information (NPI) about you and your household or business from various sources, including:

- Interviews regarding your tax situation
- Questionnaires or other documents that supply such information as your name, address, telephone number, Social Security Number, date of birth, number of dependents, income, and other tax-related data
- Tax-related documents you provide that are required for processing tax returns, such as Forms W-2, 1099R, SSA-1099, 1099-INT, 1099-DIV and stock transactions
- Electronic tools and applications used to collect, store, reconcile and compile such information
- Any other documents you provide to us to assist in the preparation of your tax return.

We do not disclose any nonpublic personal information about our clients, prospective clients, or former clients to anyone except as requested by our clients *in writing* or as required by law.

We restrict access to personal information concerning you, except to our employees who need such information in order to provide products or services to you. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your personal information.

If you have any question about our privacy policy, please ask to speak with me by contacting our office at 513-897-1040.

Sincerely,

Bruce E Bevan
Owner
T.A.X.E.S.

Thank you for choosing T.A.X.E.S. (Tax & Accounting eXtra Easy Solutions) to assist you with your 2024 taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide. This engagement does not cover legal or financial advice.

We will prepare your 2025 federal, state, school district, and city income tax returns. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. **We will NOT accept e-mails or texts which contain Protected Personal Information (PPI).**

We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will inform you of any material errors, fraud, or other illegal acts we discover.

The law imposes penalties against the taxpayer and the preparer when a taxpayer underestimates their tax liability. Call us if you have concerns about such penalties. 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.

Our price starts at \$250 for a basic Federal 1040 form with additional fees for other schedules, State, School District, and City returns, plus out-of-pocket expenses. Invoices are due and payable upon presentation. All accounts not paid within thirty (30) days are subject to interest charges to the extent permitted by state law.

We will return your original records to you at the end of this engagement. Store these records, along with all supporting documents, in a secure location, in case these items are needed later to prove accuracy and completeness of a return. We do retain some copies of your records and our work papers for your engagement for four years, after which our office may destroy these documents copies.

Our engagement to prepare your 2025 tax returns will conclude with the delivery of the completed returns to you (for paper-filing) and/or your signature and our subsequent submittal of your tax return (for e-filing). Review all tax-return documents carefully before signing them.

- **You will be solely responsible for filing the paper filed returns (i.e., city returns) with the appropriate taxing authorities.**
- **You will be responsible for making the tax payments to all taxing authorities.**

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, sign in the space indicated below.

Ohio required information:

Perjury Statement Acceptance

Under penalties of perjury, I declare that to the best of my knowledge and belief, the Ohio income tax return and, if applicable, the Ohio school district income tax return are true, correct, and complete. I also declare under penalties of perjury that if I am filing a return with my spouse, I am authorized to make this declaration on his/her behalf and to file the return for both of us.

Direct Deposit

I have read and understand the terms of the Direct Deposit Disclosure statement and accept its conditions. This is required if any portion of the Ohio refund(s) is automatically deposited into an account by the Ohio Department of Taxation.

Sales Taxes

I certify that I have provided the amount of sales or use tax which is due to Ohio \$_____

Date	CLIENT COPY
Taxpayer	Print last name(s) Spouse