

Berg Accounting Services, LLC

4037 West Broadway, Suite 201, Robbinsdale, MN 55422 763-232-0487 www.BergTaxServices.com

2022 Tax Preparation Engagement Letter

We appreciate the opportunity to work with you. To minimize the possibility of a misunderstanding between us, we are setting forth pertinent information about the services we will provide for you.

Fees are due upon services rendered. Fees for our services will be at our standard rate plus a rate of \$65 an hour for returns taking additional time to prepare. Payment for service is due when rendered. We reserve the right to stop work on any account that is past due. Occasionally we are required to provide additional services such as research, or preparation of additional schedules in conjunction with the tax preparation. If additional time is required, we will charge for these services at our standard hourly rates of \$65 per hour. All unpaid invoices over 30 days will accrue interest at 24%, monthly.

The **deadline for individual and self-employment** tax returns is **April 15, 2023**. We must receive all information by **March 31, 2023** to prepare your personal and self-employed returns to ensure that your return will be completed by April 15, 2023. If we have not received all of your information by March 31st, 2023, you may request that we file an extension with the IRS on your behalf and complete the returns after the deadline. **Please note:** You may be subject to late filing or late payment penalties, of which we assume no liability. Any taxes due must be paid by the April 15, 2023 deadline even if an extension is filed. You may set up a payment plan with the IRS or the Dept of Revenue in many cases.

We will prepare your Federal and requested State income tax returns from information that you have furnished to us. **We will not audit or otherwise verify the data you submit.** Upon request, we will furnish you with an intake form and/or worksheets to guide you in gathering the necessary information. Your use of such forms will assist in keeping pertinent information from being overlooked.

Your returns may be selected for review by the taxing authorities. **Representation services by our office are not covered under this engagement.**

It is your responsibility to maintain, in your records, the documentation necessary to support the data used in preparing your tax returns, including but not limited to the auto, travel, and related expenses and the required documents to support charitable contributions. You should retain all the documents, canceled checks/receipts and other data that form the basis of income and deductions for at least seven years. If you have any questions as to the type of records required, please ask us for advice in that regard. We are not responsible for the disallowance of doubtful deductions or inadequately supported documentation, nor for resulting taxes, penalties and interest. *Original* receipts are required for an audit.

We will use our judgment to resolve questions in your favor where a tax law is unclear if there is a reasonable justification for doing so. Whenever we are aware that a potentially applicable tax law is unclear, or that there are conflicting interpretations of the law by authorities (e.g., tax agencies and courts), we will explain the possible positions that may be taken on your return. We will follow whatever position you request, so long as it is consistent with the codes and regulations and interpretations that have been promulgated. If the IRS should later contest the position taken, there may be an assessment of additional tax plus interest and penalties. We assume no liability for any such additional penalties or assessments. We are required to keep all information about our engagement confidential, so we will not disclose any information about you unless we have your approval or are required by law. This applies even if you are no longer an active client.

Additional accounting and some resolution services are available. These services require a New Engagement. Fees are \$65/hr, 1 hour min. Examples: Resolving Letters from the taxing authorities. Tax Planning.

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If the foregoing fairly sets forth your understanding, please sign a copy of this letter in the space indicated and return it to your tax preparer. We are pleased to discuss this letter with you at any time and we appreciate this opportunity to work with you.

Sincerely,

Joy Berg

Berg Accounting Services, LLC Primary SS#: _____ - _____ - _____ BirthDate: ____/____/____

Print Name: _____ Phone Number:(____) _____

Spouses Name: _____

Answer for the household:

Did you move/change your address in 2022? Yes__ No __

Did you buy Health Ins through the MarketPlace? Yes__ No__ - If yes, must have 1095-A

Did you use Virtual Currency in 2022? Yes ____ No ____

Did you receive Frontline Worker Pay? Yes ____ No ____

If you get a refund, would you like direct deposit of the refund? Yes ____ No ____

If you owe a tax liability, would you like Auto Debit? Yes ____ No ____

Bank Account Routing #: _____ Bank Account #: _____

Taxpayer and Spouse Signatures:

I have provided Berg Accounting Services, LLC with true and accurate documentation that should be included in my 2022 tax returns. Berg Accounting Service, LLC is not responsible in the case that I have not provided to them any pertinent documentation for the filing of my 2022 income tax returns. I agree Berg Accounting Service, LLC has completed my Tax Returns accurately and correctly. I have signed and agree with all the statements included in this and the full Annual Engagement letter. Signing here, you are stating that you answered the questions on this Engagement letter truthfully and received and agree fully with the (long) Annual Engagement letter and tax filings.

Taxpayer Signature: _____ Date: _____

Email Address: _____

Spouse Signature: _____ Date: _____

Additional Years:(Circle) 2019, 2020, 2021, Additional State returns: Self-Employment: Yes/No

Payment can be made via: Cash/Check/Credit Card/Zelle/Venmo

Zelle(763-232-0487)/**Venmo (@Joy-PadillaBerg)**

Office Use:	Cash	Efile Date/Paper File/ Mail to client to send in date:	County or Rent
Time to Prep:	Credit QBO/SQR		
Amount Paid	Venmo/ Zelle/ Check #		
\$			

	Auto Debit	Direct Dep
Federal	\$ Owed	\$ Refund
MN	\$ Owed	\$ Refund
TP Initial		

Drop Off Service: Drop off Date:____/____/23 Time:_____ Pick up Date: _____ ID:_____