

Engagement Agreement for Tax Notice Resolution



THE PARTIES: This Agreement is between Grass, CPA & Associates, ps

and _____
CLIENT/TAXPAYER.

TAX YEARS _____:

TAX TYPE _____:

For Grass CPA use only	
Tax Authority:	Notice Number:
<input type="checkbox"/> Federal - IRS	
<input type="checkbox"/> State Washington – DOR, L&I	
<input type="checkbox"/> State Other - _____	
<input type="checkbox"/> Other – Cities, School Dist, _____	

The full intent of this engagement is to enter into a mutual agreement for the resolution of your Tax notice. By your signature(s) below, you, the client, Authorize Grass, CPA & Associates, ps to inquire, represent, resolve and otherwise communicate with the Tax Authority on your behalf. You the client agree to provide any Documentation and or other materials needed for the resolution of your case. Failure to provide such material may result in a lengthened resolution time, with additional interest and penalties applied. You the client agree to cease any and all independent issue resolution attempts and let Grass CPA & Associates, ps solely represent you on this matter. Any attempt to resolve this outside of our services may result in complicating the matter and confusing the Tax Authority resulting in increased penalties and lengthened resolution. If you should choose to make an attempt outside of our service it will result in voiding our engagement, forfeit of your retainer and immediate billing for services that exceed your retainer amount.

This is a separate engagement with Grass CPA and not a Continuation of any tax preparation services. As such a retainer of \$675 will be collected at the time of engagement. This retainer will be applied to all time used to resolve your issue. Any additional time will be billed at an hourly rate of \$225 - \$300 per hour. Should our investigation into your issue determines that the cause was an error or omission made by Grass CPA your retainer will be returned to you and Tax Notice Resolution will be at no charge. Errors and erroneous notices made by any taxing authority, or government agencies are considered billable.

We will perform accounting services only as needed to support your resolution process. Our work may include procedures to find defalcations or other irregularities relevant to your case. If your original return was prepared by Grass CPA, this is not typically part of our tax preparation services and was not done at the time of your return. Therefore it is an additional charge. We will only do this as necessary to resolve your Tax issue. 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

Visit our website at www.grasscpa.com

Member: Washington Association of Accounting and Tax Professionals

Email: Charlie@grasscpa.com

Engagement Agreement for Tax Notice Resolution



in question. We will, of course, inform you of any material errors, fraud, or other illegal acts we encounter.

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 the alternative you select. You, the Client, will be responsible for any estimates submitted to Grass, CPA & Associates, ps used in the process of resolving your Tax notice.

RECEIPT OF Initial DOCUMENTS:

To start this engagement we need to collect permissions and documentations from you the client. These include All Notices received by you from the IRS or Taxing Authority both before and during the resolution process, Completed engagement agreement, Power of Attorney, consent to use and disclose for all prior tax years, signed acknowledgement that you received the IRS Notice Guide provided by our office and your retainer. **No work will begin until these are signed and returned by the tax payer and spouse. (if Applicable)**

We will return all original Documents to you at the end of this engagement. You should securely store these records, along with all supporting documents, canceled checks, etc., as these items may later be needed to prove accuracy and completeness of a return. We will retain copies of your records and our work papers for your engagement for seven years, after which these documents will be destroyed.

It is the policy of Grass, CPA & Associates, ps, to release personal and/or financial information **ONLY** with the express written consent of you, the client. All additional uses or disclosures beyond scope of this engagement will require separate written consent.

Our engagement to resolve your Tax Notice will conclude when we receive notification from The tax authority that your issue has be closed, or when you notify us that you wish us to no longer pursue your case. Grass CPA may terminate this engagement at any time during this process and you the client will be responsible for all charges incurred. Grass CPA will consider your case closed if we fail to hear from you the client after 1 year with no communication

At the instruction of our insurance carrier, when a request is made for verification of income/self-employment, only a letter acknowledging that we prepared the Federal Income Tax Return for the year noted above can be provided. Consent forms and additional fees will apply.

All fees are due upon invoice. Any payment arrangements must be made in advance; the only person authorized to make a payment arrangement is the Principal, Charles D. Grass, CPA.

Visit our website at www.grasscpa.com

Member: Washington Association of Accounting and Tax Professionals

Email: Charlie@grasscpa.com

Engagement Agreement for Tax Notice Resolution



To affirm that this letter correctly summarizes your understanding of the engagement of Grass, CPA & Associates, ps for your Tax notice issue, please sign the enclosed copy of this letter in the space indicated and return it to us in the envelope provided.

Charles D. Grass, CPA

Accepted By:

Taxpayer Signature

Date

Spouse Signature

Date

Documents Received :

Documents Needed :
