



Individual Tax Preparation Engagement

Dear Client of DSB Solutions,

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide.

DSB Solutions Responsibility DSB Solutions will prepare your federal, state and local income tax returns using the information and documentation you provide. We will not audit or otherwise verify the data you submit, although it may be necessary to ask additional questions for clarification. DSB Solutions will work diligently on your behalf to accurately prepare your tax return. We will provide your refund or balance due, print the return, review the return with you, then obtain your signature before transmitting the return to the proper tax authority. You will receive a copy of your return before leaving the office. Additional copies or copies requested after the initial copy will require an additional fee (\$25-35 for electronic password protected or \$50-70 for print and mailed copy).

Changes to the Tax Return After Client Signs returns are randomly reviewed in-house for accuracy any return changes that result in the following will require the client to (1) sign a revised Form 8879 and (2) receive a revised tax return copy – free of charge; \$50 difference to total income or AGI, \$14 difference to total tax, federal income tax withheld, refund, or amount owed. **Client Responsibility** It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, cancelled checks and other data that form the basis of income and deductions. Client has full and final responsibility for the income tax returns and, therefore, you should review them carefully before signing. Signing your return approves the return and authorizes DSB Solutions to file the return. **Tax Preparation Fees:** If for some reason, you do not complete your tax filing with DSB Solutions, you will be charged an hourly rate of \$50.00 for each hour of tax preparation, not to exceed 2 hours. All tax preparation fees are due upon receipt unless you opt to have your fees deducted from your tax refund; this option has additional bank fees and stipulations for approval. **Payment of Tax Preparation Fees:** Your tax preparation fees can be paid by (1) Cash, (2) Credit/Debit Card, and (3) A deduction from your tax return (ONLY if you qualify); and are due at the time of service. To QUALIFY Client must call (800) 304-3107, on speaker phone, to check eligibility for bank product. If the Client does not have account offsets at the time of tax preparation the Client may receive a bank product. Client is personally responsible for all tax preparation fees, despite the approval of bank product. If at the time of IRS refund the client has an offset and DSB Solutions is not paid from the bank product/refund the client is responsible for payment of tax preparation fees. DSB Solutions will notify client if tax preparation fees are not received as agreed. The client must pay tax preparation fees within three (3) business days after notification of offset. DSB Solutions will add a \$50 collection fee to all accounts not collected within seven (7) days. DSB reserves the right to charge a monthly administrative of up to \$50 and interest at the highest level in accordance with current state laws. Invoices not paid within 60 days will be sent for collection to an outside agency, the Client is responsible for any collection fees, attorney, and court fees associated with collecting the debt. **Tax Examination** DSB Solutions' made the business decision to no longer represent clients during a tax examination. Therefore, all personal tax returns, for the protection of the client will include Audit Protection. The client has the right to refuse audit protection and in such case understands DSB Solutions cannot and will not represent the client during a tax examination. It is possible that your returns could be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. If you purchase a third-party audit protection you will contact the third-party directly. **We HIGHLY RECOMMEND purchasing audit protection in the event you are audited.** Otherwise, paying someone to represent you in an audit can be expensive.

☐ **Taxpayer DECLINES Protection Plus** (Audit Protection & ID Theft Restoration)

If the foregoing fairly sets forth your understanding, please print, sign, and date below.

Taxpayer Name Printed: _____

Taxpayer Signature: _____ Date: _____

Spouse Name Printed: _____

Spouse Signature: _____ Date: _____

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