



STEFFORIA | PETIK | CARLSON
CERTIFIED PUBLIC ACCOUNTANTS

2021 Engagement Letter

Dear Client,

Stefforia, Petik & Carlson, CPAs is pleased to have the opportunity to provide you with professional services. This engagement letter embodies the entire agreement regarding the services to be rendered by our firm to you.

We will prepare your returns based on your filing status (single, married filing jointly, married filing separately, head of household or qualifying widow[er] with dependent child) as reflected in your income tax returns last year. If your marital status has changed, you want to change your filing status, or you have questions about your filing status, please contact us immediately to discuss this.

The filing due date for your tax return is April 15, 2022. Stefforia, Petik & Carlson, CPAs requires that all information necessary to prepare a complete and accurate return be provided prior to March 25, 2022 in order to prepare the return prior to the April 15, 2022 deadline. Stefforia, Petik & Carlson, CPAs provides no assurances that returns received after March 25, 2022 will be completed prior to the April 15, 2022 filing deadline.

Further, Stefforia, Petik & Carlson, CPAs requires all information necessary to prepare an accurate extension request be received prior to March 25, 2022. Stefforia, Petik & Carlson, CPAs provides no assurances as to the accuracy of extension requests received after that date. The filing deadline for extended returns is October 15, 2022. For extended returns, Stefforia, Petik & Carlson, CPAs requires that all information necessary to prepare a complete and accurate return be provided prior to September 15, 2022 in order to prepare the return prior to the October 15, 2022 deadline. Stefforia, Petik & Carlson, CPAs provides no assurances that extended returns received after September 15, 2022 will be completed prior to the October 15, 2022 filing deadline. Our engagement is not intended to provide any type of income tax or estate tax planning services.

We expect to begin the preparation of your returns upon receipt of your records/organizer and all tax documents requested by our office. If upon review of these materials it comes to our attention that you may have an obligation to file additional tax returns, we will notify you of this in writing and ask you to contact us to discuss such additional returns.

You agree that in the event of unresolved tax issues or delays in processing, or if we do not receive all of the necessary information on a timely basis, it may become necessary to apply to extend the due date. Applying for an extension of time to file may extend the time available for a government agency to undertake an audit of your return or may extend the statute of limitations. In the event you owe taxes in excess of the amounts withheld from your income or, if you are self-employed, in excess of estimated tax payments made, penalties and interest may accrue on your unpaid taxes after the due date. Additionally, extensions may affect your liability for other penalties and interest or compliance with government and constituent deadlines. We are available to discuss this matter with you at your request as our regular hourly fee should the need arise.

This engagement does not include responding to inquiries by any governmental agency or tax authority. If your tax return is selected for examination or audit, you may request that we assist you in responding to such inquiry. In that event, we would be pleased to discuss providing assistance to you under the terms of a separate engagement for that specific purpose.

The potential for conflicts of interest exists in any engagement. In the event that we, in our sole discretion, believe that a conflict has arisen affecting our ability to service your account in accordance with either the ethical standards of our firm or the ethical rules of our profession, we may be required to suspend or terminate our services.

Certified public accountants (CPAs), like all providers of personal financial services, are now required by law to inform their clients of their policies regarding privacy of client information. CPAs have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law.

