

TO: O'Donnell & Company, Inc.

I have engaged O'Donnell & Company to prepare my Individual (1040) Federal and State income tax returns for the year ended December 31, 2020. I understand that it is my responsibility to provide O'Donnell & Company with all of the information required to complete my tax return. In that regard I state that, to the best of my knowledge and belief:

1. I have provided true, correct and complete information regarding my income as listed on the attached Forms W-2, 1099 and/or attached written summaries. I understand that it is my responsibility to provide all the information necessary to complete my returns. I will retain for 6 years all the documents, receipts, cancelled checks and other records required to substantiate the items of income and expense claimed on my return.
2. I have provided true, correct and complete information regarding amounts I have provided to O'Donnell & Company to claim as tax deductions, and have maintained written documentation supporting all amounts, including logbooks and receipts. I understand that if a question arises regarding the interpretation of tax law, and a conflict exists between the tax authorities' interpretation of the law, and other supportable positions, that O'Donnell & Company will use their professional judgment in resolving the issues.
3. I understand that taxing authorities may examine the returns, that documentation should be retained to support the information provided to O'Donnell & Company, especially business travel & entertainment deductions, business use % of autos and other assets, and barter activities, and that penalties may be imposed on returns that are late, underpaid or incorrect.
4. I understand that O'Donnell & Company will not audit or otherwise verify any information, that O'Donnell & Company may require clarification or additional information, that O'Donnell & Company is not responsible for disallowed deductions, or the inclusion of additional unreported income or any resulting taxes, penalties or interest.
5. I understand that, in the event of preparer error, O'Donnell & Company is responsible for any penalty charges. I am responsible for paying any tax and interest that the IRS or the state revenue department may assess.
6. I will contact O'Donnell & Company immediately if I discover additional information that will lead to a change in my return, or if I receive any letters from the IRS or state taxing authorities. I understand that additional billing may apply.
7. I understand that O'Donnell & Company policy is to put all tax advice in writing, and that I will not rely upon any unwritten advice because it may be tentative, incomplete, or not fully reviewed.
8. I understand that O'Donnell & Company's bill will be **DUE AND PAYABLE UPON COMPLETION** of these returns, and that additional services will not be performed until the bill for these services is paid in full. Should my account become delinquent, I will be responsible for all court and attorney fees and/or collection fees.

I have read, understand and accept the conditions of this engagement letter and the privacy policy attached.

Taxpayer Signature

Date

Spouse Signature

Date

2020