Peak Financial Services
2911 Dixwell Ave. Suite 103
Hamden, CT 06518

Permission Slip/ Engagement Letter

This Permission Slip/ Engagement Letter is to confirm the arrangements for our tax return preparation services. We will prepare your Individual and / or Business Federal and State Income Tax Returns for calendar year 2024 in accordance with appropriate tax laws and regulations. Your returns will be prepared solely from the information provided by **you**! For speedy completion of your taxes, please provide any information promptly to our office, if we ask for it. All information is kept confidential**! No one can get information from us without your permission, except for a government agency following due process of law.**

We must receive all information to prepare your tax return by April 5, 2025, to ensure that your return will be completed by April 15, 2024. If we have not received all of your information by then, it is possible that you will have to file an extension. You may be subject to late filing penalties/under payment penalties and interest.

You should retain all documents, canceled checks, and other data which form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority.

ALL TAX PREPARATION FEES ARE DUE AND PAYABLE AT THE TIME YOU PICK UP YOUR COMPLETE RETURN(S). A late payment penalty will be assessed 45 days after verbal notification that the tax return is completed. The penalty will be 1.5% per month.

We reserve the right to require retainers at our discretion. The retainer is an estimate of work to be performed and additional amounts may be due.

✱ **TAX PREPARATION SERVICES are based on a fee schedule, charged per form(s)/schedule(s) needed to complete your return(S).** Additional charges may include: research basis of stocks/bonds or assets sold, NOL's, multi-state returns filed, and accounting for an entire year, tax consultation for estimates, amended taxes for prior year and FAFSA reports, which are identified separately on your invoice.

OTHER SERVICES provided: Accounting, business consultation, set up of new businesses, representation in audits, and offers in compromise for back taxes owed. These are billed at a hourly rate and paid on the day of the appointment. Consultation and representation fees are charged at $125 per hour, a minimum fee of $125.

Minimum fee of $125 for any letters that we write to the IRS or any State Agencies at your request in response to a letter from them. We can't fax or email your tax return to any agency or anyone per IRS rules. You have to come into the office in person to pick up the tax return.

OTHER ADDITIONAL FEES: $20.00 for federal and state W-4 calculations. $25.00 for any Non- sufficient checks. $30.00 per copy of each tax return.

✱ **Occasionally we make mistakes. If we are at fault, we will correct your return at no cost and pay for any penalties and interest. However, we are not responsible for paying any taxes owed. Please let us know if you have received any letters from any taxing authority.**

✱ **PLEASE REVIEW YOUR RETURN(S) CAREFULLY BEFORE SIGNING AND FILING THEM. Thank you** for allowing us to serve you this year! **WE GREATLY APPRECIATE YOUR BUSINESS!**

✱ Peak Financial Services is not responsible for providing any of the deductions taken on my tax return(s). I have provided this information from my own records and I have proof of my deductions and income. I (we) give our permission to prepare my (our) tax return(s) and I (we) have read, understood and agree to terms of this engagement and <u>I (we) have read the Private Act of this form on the reverse side of this letter.</u>

Donald Fleming Jr.

Donald R. Fleming Jr.
Peak Financial Services

Taxpayer **(PRINT)** **(SIGN)** **DATE**

Taxpayer **(PRINT)** **(SIGN)** **DATE**

Privacy Policy Act

It has always been the policy of Peak Financial Services to keep all information that we collect from you, confidential from all sources. We restrict access to all nonpublic personal information about you to members of our firm who need to know that information to provide services to you. We do collect nonpublic personal information about you from the following services.

- Information we received from you on tax preparation organizers, worksheets, Federal and State tax reporting forms, and from other document we use in tax preparation or other financial and related services.
- Information about your transaction with us, our affiliates, and others.
- Information we may receive from outside agencies such as banks and brokerage houses.

We do not disclose any nonpublic personal information about our clients or former clients, except as permitted, required, or approved by you in writing as list below:

- Requirements to comply with federal, state or local law.
- Requirements to comply with national, state or local licensing rules.
- Requirements to disclose information in response to legal subpoenas.
- Items you permit or request us to disclose, as authorized by you <u>in writing</u>.
- Information that you authorize us to disclose by signing this engagement letter to electronically file your tax return, when applicable.
- Information that you authorize us to disclose by signing this engagement letter, which discloses that you are our client, without disclosure of financial or other personal information.

(initial here)