



Chesterfield Location  
825 Maryville Centre Dr. Suite 210  
Chesterfield, MO 63017  
314-446-0425

## Letter of Engagement

Thank you for choosing Integrated Tax Solutions, Inc. to assist you with your 2024 taxes. This letter confirms the terms of our engagement and outlines the nature and extent of the services we will provide.

**Privacy:** We collect nonpublic personal information about you from various sources that is required for processing your tax returns. We do not disclose any nonpublic information about our clients, or former clients, to anyone, except as requested by the client or as required by law. A signed Release of Information form must be completed and on file in our office allowing our practice to communicate with another individual or firm. We maintain physical, electronic, and procedural safeguards that comply with Federal regulations in order to protect your information.

**Foreign Accounts and Virtual Currency Transactions:** At any time during 2024, unless disclosed and detailed records provided, you confirm you did NOT have any taxable or reportable virtual currency transactions or a financial interest in or signature authority over a financial account located in a foreign country. Additionally, you did NOT receive a distribution from, or were a grantor of, or transferor to, a foreign trust.

**Engagement:** We will prepare your 2024 Federal and State income tax returns. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations or other irregularities. 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 you submit. We will inform you of any material errors, fraud, or other illegal acts we discover.

The law imposes penalties when taxpayers underestimate their tax liability. Call us if you have concerns about such penalties.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable course of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

Our fee is based on an industry-accepted price-per-form fee schedule, including discounts for financial planning clients. Invoices are due and payable upon completion of your return and will include the following options for payments: direct debit of a bank account, charge to a credit card, or payment by check. Payment is required PRIOR to e-filing of your return.

We will return your original records to you at the end of this engagement. Store these records, along with all supporting documents, in a secure location. We retain copies of your records, our work papers, and your filed returns for a period of three years.

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4488 or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).



Chesterfield Location  
825 Maryville Centre Dr. Suite 210  
Chesterfield, MO 63017  
314-446-0425

If you have not elected to e-file your returns with our office, you will be solely responsible for filing the returns with the appropriate taxing authorities. Review all tax-return documents before signing them. Our engagement to prepare your 2024 tax returns will conclude with the delivery of the completed returns: or, with e-filed returns, with your signature and our subsequent submittal of your tax return.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign below and return this Letter of Engagement with your checklist and tax documents.

### ACCEPTED BY:

Signature

Taxpayer: \_\_\_\_\_

Signature

Spouse: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Printed Name: \_\_\_\_\_

E-Mail: \_\_\_\_\_

Phone: \_\_\_\_\_

### Current Driver's License Information:

Taxpayer's # \_\_\_\_\_

Spouse's # \_\_\_\_\_

Date Issued: \_\_\_\_\_

Date Issued: \_\_\_\_\_

Date Expires: \_\_\_\_\_

Date Expires: \_\_\_\_\_