Dear Client:

We are looking forward to working with you again this year! The enclosed Client Information Sheet is designed to help you gather the tax information needed to prepare your 2022 personal income tax return. ****These questions provide us with important tax items necessary for us to prepare your return quickly, efficiently, and most important, accurately. Therefore, it is imperative that all sections are completed.****

On the back side of this letter, please find our 2022 Individual Tax Return Engagement Letter. This <u>must</u> be signed and returned with your tax information for us to begin work on your tax return.

You will also find a helpful checklist on page 7 of the Client Information Sheet that will assist you in gathering all the necessary tax documents for us to complete your tax return.

You have the following options for getting all documents (<u>MUST be in PDF format</u>) to us:

1. Belt Accounting portal – upload <u>PDF</u> documents directly to our secure portal (email donagriffith@belt-accounting.com to request this option).
2. Drop off at our office during normal business hours:
   2417 Silvernail Rd
   Pewaukee, WI 53072

Mon-Thu	9:00 am – 6:00 pm
Fri	9:00 am – 4:00 pm
Sat	9:00 am – 1:00 pm
3. Drop off <u>*with*</u> a scheduled appointment to meet with a staff member. Appointments can be scheduled by calling our office at (262) 646-4323 and selecting 0, or online at www.belt-accounting.com.
4. ***New for 2022**: select clients will be offered a new option to upload via a third-party app
5. Mail to our office. If selecting this option, it is necessary that you mail with tracking (Fedex, UPS, etc.) to ensure documents are not lost or compromised.

IMPORTANT: while the Federal filing deadline for tax year 2022 will be April 18th, **BELT ACCOUNTING** will be strictly adhering to an earlier deadline of 4/13/2023 at 5:00 pm, **no exceptions**, to ensure there are no system delays or bottlenecks with the IRS in processing. Additionally, our office <u>**will be closed on Monday April 17th**</u>, to give our staff a mental health break following the end of another tax season. To assist us in meeting the filing deadline for your 2022 income tax return, **ALL your tax documents (including a signed engagement letter and a completed Client Information Sheet) must be <u>received</u> by us no later than Friday March 24th.**

If we receive your data after 3/24/2023, we will make every effort to meet the filing deadline, but we will **require a minimum $50 fee up front** to file an extension on your behalf. Additionally, <u>you are responsible for ensuring that any balances due to the federal and/or state(s) are made on or before April 18, 2023</u>. The extension ONLY provides additional time to file the return, not additional time to pay your taxes. If you believe that you will have a balance due to the IRS and/or state(s), and require assistance with calculations, hourly rates will apply.

You will receive notification via e-mail when your tax return is complete. <u>Please ensure that you are checking your email regularly, including your spam folders</u>. Your completed 2022 income tax returns will be **submitted for electronic filing** to the federal and state(s) governments <u>**two (2) business days following receipt of payment**</u> of your 2022 tax preparation fee <u>**AND signed Form 8879**</u>.

Thank you for the opportunity to serve you.

Sincerely,
Belt Accounting & Tax, LLC

2022 INDIVIDUAL TAX RETURN ENGAGEMENT LETTER

Dear Client:

This letter confirms the terms of our engagement with you and the nature and extent of the services we will provide.

We will prepare your 2022 federal and all state income tax returns using the information you provide to us. We may ask for clarification of some items, but we will not audit or otherwise verify the data you submit. The completed Client Information Sheet is designed to assist you with gathering all the information required to complete your return, along with providing us necessary data to ensure accuracy. Therefore, it is essential that this Client Information Sheet be completed in its entirety and signed prior to preparation of your tax return.

It is your responsibility to provide information required for preparation of complete and accurate returns. You should keep all documents, canceled checks and other data that support your reported income and deductions. They may be necessary to prove accuracy and completeness of the returns to a taxing authority. You are responsible for the returns, so you should review them carefully before you sign them.

Our fees for this work will be based on the complexity of your tax return, the amount of time required to complete the return, including time spent following up on incomplete or missing information and documents, plus any out-of-pocket expenses. If you require an estimate, we will give you a non-binding estimate based upon your representations about the complexity of your returns. All tax return invoices are due and payable upon presentation to you and prior to us submitting them on your behalf.

Our fees include the following:

- 1040 Federal and State returns with schedules.
- Estimated tax payments calculation.
- Client meeting – one 15 min. client meeting is included in the fee. Fees will be adjusted for additional meetings.
- Client phone calls and emails to answer basic tax questions. Additional fees may apply for calls and emails that require research or are related to tax planning.
- Tax questions and tax information – no charge for general tax information. Exception will be for advanced research.
- ONE copy (electronic or paper) of your tax return. If additional copies are requested, additional fees will apply.

Your returns may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. If the government selects your returns for review, we can arrange to represent you. Such representation will be a separate engagement for which an engagement letter will be provided to you. Fees and expenses for defending the returns will be invoiced in accordance with terms we agree on for that engagement.

In the unlikely event of a calculation error in the preparation of your tax return, we will reimburse you for any penalty for which we made you liable, provided the information that you supplied us was correct.

We are committed to the safeguarding of your confidential information, and we maintain physical and electronic safeguards to protect your information within our office. Unless required by law, we will not disclose any information about you unless we have your written approval as required under Reg. §301.7216-3(a)(1), even if you are no longer a client.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign this letter in the space indicated below and we will retain a copy in your client file.

Again, we want to express our appreciation for the opportunity to work with you, and hope that you will bring any questions or concerns to our attention.

Sincerely,
Belt Accounting & Tax, LLC

______________________	______________________	__________
Taxpayer Signature	Print Name	Date
______________________	______________________	__________
Spouse Signature	Print Name	Date