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A Tax Resolution & Wealth Management Firm

Engagement Letter for 2023 Individual Tax Return Preparation

Thank you for choosing The Master's Tax & Financial Services to assist you with your 2023 taxes. This letter is to inform you (our client) of what service we (The Master's Tax & Financial Services) provide to you in relation to tax return preparation, what responsibilities you have, and what our responsibilities are. It also covers a few legal requirements.

We are trained to prepare taxes and are held accountable for our judgment in tax matters. However, the law clearly holds you accountable for the accuracy of your return and the submission of your return to the government. It should be obvious that we cannot act upon information that we do not have. Therefore, we will prepare your tax return(s) based on the information you provided to us generally without audit (i.e., validation of the information); we rely on you to ensure that all information is authentic and accurate. However, there are limited areas where we are required to substantiate some of your information. Furthermore, we are required to apply a reasonable amount of judgment on the accuracy of your information. Therefore, in some cases we will request clarification and/or supporting documentation.

Completion of an income tax return is an act of reporting history, not creating history. Therefore, we cannot guarantee a particular result or outcome.

This engagement is for the preparation of your individual income tax return(s) (i.e., Form 1040 and related state forms) only and begins at the earlier of our interview of you related to financial events of the year or your delivery of documents to us related to this/these tax return(s). This engagement and associated fee do not include organizing or assisting you in organizing your information, bookkeeping, or other accounting services. (Thus, we will not endeavor to and should not be relied upon to identify and notify you of any errors, fraud, embezzlement, or other wrongdoing.) It does not include any FinCEN filings unless separately agreed to. It does not include returns associated with self-directed IRAs (i.e., Form 990-T). Fees are to be paid before your tax return is finalized unless prior arrangements are made, and then interest charges may be applied to your account as permitted by law. If you terminate this engagement before completion you agree to pay a fee for the work completed. Payment in advance is required for preparation of late returns; it will be applied to the final fee. The engagement ends with the filing of your personal individual tax returns. Addressing any examination of your return by a government agency is not included in this engagement.

Please include the addendum to this Engagement Letter for sole proprietor business activities if applicable.

Additional services are available and may be included at a discount rate by purchasing one of the offered Tax Packages documented on a separate flyer if available for your income tax return. Please indicate here the Tax Package that you desire to purchase by initialing in one place:

Bronze Package	Silver Package	Gold Package
Initial: _____	Initial: _____	Initial: _____

We will use our judgment to prepare your return to your best overall advantage in a manner consistent with the law. Should a tax authority rule contrary to us in a tax issue, our liability is limited to the fees you paid to us for the tax return preparation and does not apply to any tax liability.

By signing this letter and the materials associated with your tax return(s) prepared by us, you declare that you have provided to us all income and deductible expense information, and that all expenses or other

Richard Ogg, Financial Advisor (California Insurance License #0G48566) – Securities offered through Avantax Investment ServicesSM, Member FINRA, SIPC. Investment advisory services offered through Avantax Advisory ServicesSM. Placing business through Avantax Insurance AgencySM and Avantax Insurance ServicesSM.

deductions are authentic, accurate, and that you have all required supporting written records, which you can supply upon request. (We can provide guidance concerning what evidence is acceptable.) Estimates of your expenses are generally not deductible.

We will indicate on your tax return that the applicable government authority may contact us with questions about your tax return unless you instruct us to the contrary.

We will endeavor to complete your return by the filing deadline. However, we will not guarantee to complete your return by the deadline, and if we are still missing information with less than two weeks remaining, you should file an extension if allowed (which we can do for you). Note that an extension allows additional time to complete and file your tax return, but it does not allow for an extension in time for paying any tax due. When filing an extension, an estimated tax payment of your final tax liability is required, and you may need to include a tax payment with the request for extension as appropriate, the projection of which is not included in this engagement. Initial here if you want to decline assistance on filing an extension.

_____ Decline this extension service and accept responsibility for filing your own extension.

If you are filing a joint return, you agree that you are both clients and you bind each other. You acknowledge no expectation of privacy from the other person. Should you desire separate or individual tax preparation or representation at any time in the future, we can only provide that with full disclosure to both parties to the extent that the returns are interrelated. Similarly, if we are preparing a tax return for you and we have previously prepared a joint return for you with a different person, then you agree that we may attempt to obtain or disclose any information we deem appropriate for accurate tax return preparation with the individual you previously filed with or their tax preparer/representative. A signed customized Consent to Disclose will likely be required, which we will create.

We prepare your tax return(s) exclusively for filing with the applicable government authority. If you present your tax return(s) to a third party for any reason, you agree to inform them that we have no responsibility for the accuracy or assurance of the amounts reported (since we derived those amounts from your records). You also agree to indemnify and hold us harmless in the event that any claims are filed against us, individually or The Master's Tax & Financial Services, related to the presented tax return(s). You agree to reimburse us for any expenses associated with 3rd party legal action.

We may terminate this engagement if you become uncooperative or we are unable to obtain information from you in a timely fashion, you fail to respond to our communication within one calendar week (unless previously arranged), you fail to meet payment terms, a conflict of interest develops, you fail to follow our tax advice, or it appears to us that you are acting in an unethical way.

This agreement is governed by the laws of California and any dispute shall be resolved in Santa Rosa, CA. Any dispute must be initiated by the later of 1 year after we file your tax return or 30 days of your receipt of written communication from a government authority challenging the accuracy of your tax return.

Privacy: We take very seriously your private information. We provide a Privacy Statement (last revised 2 January 2020) and by signing below you assert that you have reviewed that document.

Signatures: By signing below you agree that you have read, understand, and accept your obligations and responsibilities stated above, plus you understand our responsibilities and limit of liabilities as explained above. For a joint return, both the taxpayer and spouse must sign (except for a surviving spouse).

_____ Taxpayer Name (Printed)	_____ Taxpayer Signature	_____ Date
_____ Spouse Name (Printed)	_____ Spouse Signature	_____ Date