



Bluff Country Financial Services  
106 E. Maple / PO Box 306 / Houston, MN 55943  
507-896-3030 / [ask@bluff-financial.com](mailto:ask@bluff-financial.com) / [www.bluff-financial.com](http://www.bluff-financial.com)

### **2018 Tax Engagement**

We will depend on you to provide the information we need to prepare complete and accurate 2018 federal and state income tax returns. We will perform accounting services only as needed to prepare your tax returns. 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 not audit or otherwise verify data you submit. We will, of course, inform you of any material errors, fraud, or other illegal acts we discover. The law imposes penalties when taxpayers underestimate their tax liability.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each.

Also, please be aware when a self-employed taxpayer reduces taxable income there is also a reduction in earned income reported to the Social Security Administration, which could reduce current and future benefits for the taxpayer and his or her dependents.

Additional fees may be applied for out-of-pocket expenses and above average time spent on your return. Invoices for our services are due prior to e-filing or releasing your tax return.

We will return your original records and supporting documents at the end of this engagement. We suggest you securely store these records and documents as they may be needed at a later date to prove accuracy and completeness of your return.

Our engagement to prepare your 2018 tax returns will conclude with the delivery of the completed returns to you (if paper filing) or your signing, and the subsequent submittal of your tax return (if e-filing). If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax return documents carefully before signing them.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign below. Both spouses must sign when preparing a joint return.

Client's Signature \_\_\_\_\_ Date \_\_\_\_\_

Spouse's Signature \_\_\_\_\_ Date \_\_\_\_\_

**CONTINUE ON THE REVERSE SIDE**



## **Consent to Use Tax Return Information for Other Tax-Related Services**

Due to IRS regulations, we must obtain your permission to use your tax return information for purposes other than the actual preparation of your tax return. Our firm provides additional tax services beyond tax preparation, including year-round tax planning and tax consultation service. We cannot provide these services to you without your written consent.

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use, without your consent, your tax return information for purposes other than the preparation and filing of your tax return.

*You are not required to sign this consent form. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. Your consent is valid for the amount of time you specify. If you do not specify the duration of your consent, your consent is valid for one year.*

### **Authorization**

I/We authorize the use of my tax information, at my request, for the purpose of offering the following services, including, but not limited to the following:

- Life event tax advice, including marriage, divorce, college planning, estate and trust planning, and retirement.
- Year-round tax planning, including revising estimated tax payments and adjusting W-4 withholding allowances.
- Investment planning, including the purchase, sale or exchange of real estate.
- Responding to any other tax or financial questions that may arise.
- Acquisition and disposal of stock, bonds, and other assets.

I also consent to the use of my tax information for purposes of communicating with me via newsletter, email, website, phone or other means of communicating with information or data that may be of use to me, and at my request, for the purpose of making recommendations to me, for any of the purposes listed above.

Duration of consent (defaults to one year if left blank): \_\_\_\_\_

Client's signature \_\_\_\_\_ Date \_\_\_\_\_

Spouse's Signature \_\_\_\_\_ Date \_\_\_\_\_

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 1-800-366-4484 or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).