



Bluff Country Financial Services  
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## **2023 Tax Engagement**

We will depend on you to provide the information we need to prepare complete and accurate 2023 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.

You also acknowledge that you understand the additional reporting requirements if you have a financial interest in, or signature or other authority over, bank accounts, securities, or other financial accounts having an aggregate value exceeding \$10,000.00 in a foreign country.

You acknowledge that you have reported all 2023 income you received including barter, cryptocurrency, consumer-to-consumer activity, cash-based revenues, and all other income whether received in-person, in-kind, or electronically.

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 2023 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 \_\_\_\_\_