

Lillian's Professional Services, LLC
474 Marcus Garvey Blvd, Brooklyn NY 11216
Engagement in Preparation of Your Tax Returns (Revised 01/2024)

Tax Filing Season 2024, we appreciate your business and patience as we go through staff changes. Please allow our trained and friendly staff to assist you.

Thank you for choosing **Lillian's Professional Services, LLC** (referred to as **LPS**) to assist you with your **current or previous year** tax preparation. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide. **LPS** will prepare your **current or previous year** federal and/or state income tax returns. We will depend on you to provide the information we need to prepare and complete an accurate return to minimize errors.

You Must “carefully review all tax documents before signing them”.

Our engagement concludes with the delivery of your completed return after **Mandatory E-Filing** them. If you **DO NOT** E-file, **Penalties** can apply for non-compliance.

This engagement will also act as a written consent giving **LPS** permission to prepare your return even if you are **NOT** present and discuss the details via telephone or email. We may ask you to clarify some items but will **NOT** Audit the data you submit. Our **Worry-Free Audit Protection Plan** is **included** to cover **current year Individual Tax Returns Only**. (Other yrs. are separate cost). Audit Protection Plan for Business Tax Returns is also a separate cost.

We will perform services only as needed to prepare your tax returns and will **NOT** include procedures to find irregularities. Please include **ALL** income documents. **The law imposes serious Penalties when taxpayers underestimate their tax liabilities**. It may be necessary for you to clarify some of the information you submit. E-File will **ONLY** occur upon verbal confirmation and signature of **ALL** required documents (before transmittal).

Our fees are posted. ALL PAYMENTS are due and payable upon receipt. To the extent permitted by State Law, an interest charge may be added to all accounts not paid within thirty (30) days.

We return **ALL** your original documents at the end of this engagement, for you to securely store for your records, along with all supporting documents, as these items may later be needed to prove accuracy and completeness of your return. We retain digital copies of your tax return for up to 7 years, after which these documents are securely destroyed.

Signing this Engagement letter affirms that you have READ and UNDERSTAND it. Please sign below & return along with your tax documents, and necessary completed forms. **You can fax documents to 718-735-7822 or Scan & email to info@liliansprofessionalservices.com.**

We thank you for the opportunity to serve you and appreciate your trust and confidence in our firm. Please feel free to contact us if you have any questions **718-953-6455**, our office is open **Year Round**.

Sincerely, **Lillian's Professional Services, LLC**

Accepted By:

X _____ In-Person
Print name of one signer Date

X _____ Remotely
Taxpayer Signature Spouse Signature