

Engagement Letter for Tax Return Preparation

Tax Year 2025

This form can be filled out, signed, and submitted online at sparrowtax.com

This letter informs you, the taxpayer, of the services provided to you and the responsibilities you have to prepare your tax return.

Tax Return Preparation

- We will prepare your federal and state tax returns based on your provided information. Services for your return do not include auditing or verification of the information supplied by you.
- This engagement does not include any audit or examination of your books or records. It's your responsibility to verify your records in an audit.
- The tax return preparation fee does not include bookkeeping.
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to taxing authorities' correspondence.
- Preparation fees do cover limited assistance and consultation during the year.
- The engagement to prepare your tax returns terminates upon delivery of your completed returns. Please store your supporting documents and copies of your tax returns securely for at least seven years.

Taxpayer Responsibilities

- You agree to provide us with all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask you to review your documentation.
- You must provide written records of all items included on your return if audited by the IRS or state tax authority. We can guide what evidence is acceptable.
- You must review the return carefully before signing to make sure the information is correct.
- If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required for the preparation of late returns.
- Tax prep fees are due and payable before filing your completed tax returns.
- Additional fees will occur for correspondence to letters received from the IRS, state, or local taxing authorities unless deemed otherwise.



• **Did you move in 2025?**

- ☐ No
- ☐ Yes →

- Street:
- City:
- State:
- Zip:

• **Did you have a child in 2025?**

- ☐ No
- ☐ Yes →

- Full Name of Child:
- Social Security Number:
- Birthday:

• **During 2025, did you have any activity involving cryptocurrency or other digital assets (buying, selling, receiving, exchanging, or transferring)?**

- ☐ No
- ☐ Yes

• **Do you want to have your refund direct deposited?**

- ☐ No
- ☐ Yes →

- Bank Name:
- Routing Number:
- Account Number:

• **Do you want us to schedule tax payments using the same bank?(The payment will be scheduled with the filing of your tax return.)**

- ☐ No
- ☐ Yes

• **Primary Taxpayer**

- Name:
- Business Name (if applicable):
- Email:
- Cell Phone:

• **Spouse (if applicable)**

- Name:
- Business Name (if applicable):
- Email:
- Cell Phone:

By signing below, you acknowledge that you have read, understood, and accept your obligations and responsibilities in the tax preparation process. You also acknowledge our responsibilities in preparing your tax returns as explained. For joint returns, both taxpayers must sign. Please keep a copy of your tax return and related documents for your records.

• **Primary Taxpayer Signature:** _____ **Date:** _____

• **Spouse Signature (if applicable):** _____ **Date:** _____

Privacy Policy

We collect and use nonpublic personal information provided by you to prepare your tax returns. This information may include financial data, personal details, and records obtained through forms, interviews, or statements. We safeguard your information through physical, electronic, and procedural measures in compliance with federal regulations. We will not disclose your information without your consent, except as required by law. For questions about our privacy policy, please contact us directly.

