

Sam Phillips, CPA

413 N Broadway Ave, Salem IL 62881
240 N Main St, Breese IL 62230

Welcome to Sam Phillips CPA!

Thank you for choosing us to prepare your income tax returns for tax year 2023! This letter confirms the services we will provide.

We will prepare your federal and state returns for tax year 2023 based on information you provide. Although our work will not include procedures to discover irregularities or inaccuracies in the tax data you provide, we may ask for clarification of certain information, or additional information, so that we can prepare accurate and complete returns for you.

It is your responsibility to provide all necessary information related to income and deductions for tax year 2023, and to respond to our inquiries in a timely manner so that we are able to accurately complete your returns by the appropriate due dates.

You are responsible for maintaining appropriate records, such as official tax documents you receive, receipts and substantiation for your deductions, and purchase and sales information for assets.

It is your responsibility to review your returns before they are filed to determine that all income has been correctly reported and that you have substantiation for your deductions. Filing your returns by the due dates is your responsibility. We will charge a minimum \$100 expedited fee for tax returns that are dropped off after September 15, 2023.

If your returns are later selected for review or audit by taxing authorities, we will be glad to assist or represent you if you desire. Our fees for preparing your returns do not include time that might be necessary to assist you during a taxing authority review.

Our fees for preparation of your returns are based upon our standard billing rates plus any out-of-pocket expenses, if incurred. Our invoices are due and payable prior to e-filing your tax returns; a late fee will be assessed for invoices paid after 30 days of the due date.

If this letter accurately summarizes your understanding of our agreement related to the preparation of your tax returns, please sign below in the space indicated and return it to us.

We appreciate your business!

Sincerely,

Sam Phillips, CPA

Accepted By: _____ /_____/2024
(Taxpayer Signature)

_____/_____/2024
(Spouse Signature)