

## Tax Planning Engagement

Date: \_\_\_\_\_ Client Name(s) \_\_\_\_\_

This letter serves to confirm our understanding of the services you have asked us to perform and the terms under which we have agreed to do that work. Please read this letter carefully because it is important to both our firm and you that you understand what you can and cannot expect from this engagement. In other words, we want you to know the limitations of the services you have asked us to perform.

For this tax planning engagement we will provide you with income tax projections that may include potential tax planning strategies. It is our goal to identify opportunities that may be available to minimize your overall tax liability whilst remaining compliant. We will rely upon information that you have provided in our discussions along with any documentation. In some instances, we may rely upon prior year data. The appropriateness of our recommendations depends on the reliability and accuracy of the information you provide to us. We will not audit, review, compile or otherwise verify the data you provide, but we may ask you to clarify the information if it is unclear.

The strategies and advice we offer reflect our professional judgment and are based on the information you have provided and the current tax code. Subsequent changes to your individual circumstances or to the tax code may affect advice previously provided. As such, we encourage two way communications throughout the year.

### Client Responsibilities

1. You are responsible for providing us with access to information of which is relevant to this tax planning process, such as records, documentation and explanations. Additionally, you understand the accuracy and completeness of such information is your sole responsibility.
2. You are responsible for final decision and implementation of any tax planning recommendations provided to you under this engagement.
3. Your payment for our services is due at the time of completion.

Our **minimum** fee for this engagement is \$75. We will complete projections within two weeks of receiving the documents required.

To complete your current year tax projection, we will need this signed engagement form along with your most recent tax information: paystub(s), change in filing status, sale of/purchase of property documents, investment statement(s), business financials, etc. Your J&J representative will reach out to you with any questions upon preparation. You will be provided a tax planner for your review.

---

Taxpayer Signature

Date

---

Email

Telephone