

Affinity Financial Advisors, LLC
1396 US Hwy 1396 East / P.O. Box 455
(Please use P.O. box for USPS mail.)
Ledgewood, NJ 07852
(862) 251-3898
info@afafinancial.net

Date: _____

Client Name: _____

Street Address: _____

City/State/Zip: _____

Client Engagement Letter

Dear Client(s):

This letter confirms the terms of our agreement and outlines the nature and extent of services we will provide to you. Based upon the information you furnish to us, we will prepare your Federal and applicable state income tax returns for 2021.

We will not audit or verify the data you submit to us, although we may ask you to provide clarification when necessary. All the information you submit to us will, to the best of your knowledge, be correct and complete and will include all information necessary for the completion of accurate tax returns.

We will also prepare 2022 estimated tax vouchers, if required, based on your income and withholding taxes for 2021. If you anticipate a substantial change in income or withholding taxes for 2022, please advise us as soon as possible. We will then determine whether an adjustment should be made to your tax estimates. Please keep in mind, depending on the complexity of the changes, this may be deemed by us to be a separate engagement, for which an additional charge may apply.

Your returns are subject to review by the taxing authorities. In the event of an examination or audit, we can be available upon request to represent you, or to review the results of any examination by a taxing authority. Billing for these additional services will be at our standard rates.

We will work diligently to prepare accurate tax returns and will use the "more likely than not" standard in preparing the returns, as defined by the Internal Revenue Service. Should we deem it necessary to include any disclosures in your tax returns, we will review these with you prior to filing your returns.

The charges for our services are based on our fee schedule and the complexity of your returns. You agree to pay in full for your tax returns and any related services prior to the filing of your returns. You also agree to sign all required signature documents and release forms prior to the filing of your tax returns.

You have the final responsibility for your income tax returns. Please review them carefully before you sign them.

If the above is in accordance with your understanding of the terms and conditions of our agreement, please sign below. If spouses are filing a joint return, both spouses must sign this engagement letter.

Sincerely,

Susan Truman, CFP®, EA

Accepted by:

Client signature

Date

Spouse signature (if Married)

Date