



DLR PROFESSIONAL SERVICES INC.

TAX ENGAGEMENT LETTER

2125 WILLIAMSBRIDGE RD | INFO@DLRPROFESSIONALSERVICES.COM

BUSINESS PHONE: (929) 607-3875 | MOBILE BUSINESS: (917) 951-0244

CLIENT INFORMATION

This Agreement is entered into as of the date signed below by and between:

CLIENT(S)

ADDRESS

EMAIL / PHONE

AND

DLR PROFESSIONAL SERVICES INC. (THE FIRM)

A New York corporation providing professional tax preparation services.

2125 WILLIAMSBRIDGE ROAD, 2ND FLOOR, SUITE 1, BRONX, NY 10461

SCOPE OF SERVICES

The Firm will provide professional tax preparation services for the Client for the tax year shown below.

TAX YEAR

- Preparation of federal, state, and local tax returns.
- Preparation of supporting schedules and attachments required by law.
- Preparation of Form 1040 and its required supporting schedules.
- Preparation of business returns, if applicable, including corporation, partnership, and LLC returns.
- Electronic filing after receipt of a properly executed IRS Form 8879 or other required authorization.
- Professional consultation regarding allowable deductions, credits, and reporting obligations during this engagement.
- Delivery of a copy of the filed returns.

EXCLUDED SERVICES: This Agreement does not include bookkeeping, payroll, financial-statement audits, IRS or state audit representation, or legal advice unless covered by a separate written agreement.

RELIANCE ON CLIENT INFORMATION

The Firm will prepare the returns from the records and representations supplied by the Client and will not independently audit or verify that information unless separately agreed in writing. If information appears incomplete, inconsistent, or questionable, the Firm may request clarification or supporting documents and may pause the engagement until the requested information is received.

RETURN REVIEW, FILING DEADLINES AND EXTENSIONS

The Client must review each completed return and notify the Firm of any error or missing item before signing Form 8879 or another filing authorization. The Firm cannot guarantee timely filing when records, approvals, signatures, or payment are provided late. An extension increases the time to file a return but does not extend the time to pay tax; estimated balances should be paid by the original due date to reduce possible penalties and interest.

COMMUNICATION, DOCUMENT DELIVERY AND RECORD RETENTION

The Client agrees to respond promptly to requests and to provide sensitive records through the Firm's secure client portal or another approved method. Original records remain the Client's property, and the Client is responsible for retaining complete copies of all supporting documents, signed authorizations, and filed returns.



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DUTIES AND RESPONSIBILITIES OF THE CLIENT

To support accurate and timely filing, the Client agrees to:

- Provide true, complete, and accurate financial and personal information necessary for preparation.
- Submit all forms and records, including Forms W-2, 1099, 1098, K-1, and 1095-A, receipts, invoices, and bank statements, in a timely manner.
- Complete the annual Client Organizer and promptly sign Form 8879 or any other required e-file authorization.
- Review the completed return and immediately advise the Firm of any errors or omissions before filing.
- Retain all supporting documentation for at least seven years.

The Client understands that inaccurate, incomplete, or late information may result in penalties, interest, or disallowance of deductions or credits, for which the Firm will not be responsible.

COMPENSATION AND PAYMENT TERMS

The Client agrees to compensate the Firm for professional services rendered. Fees are based on the complexity of the return, the forms required, and the professional time expended.

- Payment in full is due before any return is filed.
- The Firm may withhold filing until payment is received in cleared funds.
- Additional fees may apply for amended returns, prior-year corrections, bookkeeping, audit assistance, or IRS and state representation.
- The Firm may charge late fees or suspend services for delinquent payment.

FULL PAYMENT IS REQUIRED BEFORE E-FILEING. LATE PAYMENTS MAY INCUR ADDITIONAL FEES.

LIMITATION OF LIABILITY

The Firm will exercise due professional care and diligence. Ultimate responsibility for the accuracy and completeness of the filed return rests with the Client. The Firm will not be liable for penalties, interest, or damages arising from inaccurate, incomplete, or untimely information provided by the Client. Any liability of the Firm will not exceed the fees paid for the specific services covered by this Agreement.



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CONFIDENTIALITY AND DATA PROTECTION

The Firm will maintain the confidentiality of Client information and records except as required by law or authorized in writing by the Client. Data will be handled and stored securely in accordance with applicable IRS rules, federal privacy laws, and professional standards.

TERM AND TERMINATION

This Agreement begins on the date signed and remains in effect until the services are completed, unless either party terminates it earlier in writing. Upon termination, the Client remains responsible for all fees accrued for services performed through the termination date.

GOVERNING LAW AND JURISDICTION

This Agreement is governed by the laws of the State of New York. Any dispute arising from this Agreement will be subject to the exclusive jurisdiction of the courts located in New York County, New York.

ENTIRE AGREEMENT

This document is the entire Agreement between the parties and supersedes all prior written or oral understandings concerning its subject matter. Any modification must be in writing and signed by both parties.

EXECUTION AND ACCEPTANCE

By signing below, the Client confirms that they have read, understood, and accepted all terms of this Engagement Agreement. The Client authorizes DLR Professional Services Inc. to prepare and file the applicable tax returns on the Client's behalf after receiving all required filing authorizations.

CLIENT SIGNATURE

DATE

SPOUSE SIGNATURE (IF JOINT)

DATE

FIRM REPRESENTATIVE

DATE