

DELAROSA PROFESSIONAL SERVICES Inc.

TAX ENGAGEMENT LETTER

Client Information

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

Client(s): _____

Address: _____

Email/Phone: _____

and

DELAROSA PROFESSIONAL SERVICES INC ("the Firm")

A duly incorporated entity under the laws of the State of New York, with its principal office located at:

2125 Williamsbridge Road

2nd Floor, Suite 1,

Bronx, NY 10461

Office: (929) 607-3875 | info@dlrprofessionalservices.com

Website: dlrprofessionalservices.com

Scope of Services

The Firm shall provide professional tax preparation services for the Client for the tax year ending December 31, 20__.

These services include but are not limited to:

- Preparation of federal, state, and local tax returns
- Preparation of supporting schedules and attachments as required by law.
- Preparation of Form 1040 and required supporting schedules
- Preparation of business returns if applicable (Corporation, Partnership, LLC)
- Electronic filing of returns upon receipt of duly executed IRS Form 8879 (e-file authorization)
- Professional consultation regarding allowable deductions, credits, and reporting obligations during the engagement.
- Delivery of a copy of your filed returns

Excluded Services: *This Agreement does not cover bookkeeping, payroll, financial audits, IRS/state audit representation, or legal advisory services unless a separate written agreement is executed.*

Duties and Responsibilities of the Client

To ensure accurate and timely filing, the client agrees to:

- Provide true, complete, and accurate financial and personal information necessary for preparation.
- Submit all forms (W-2s, 1099s, 1098s, K-1s, 1095-As, receipts, invoices, bank statements, etc.) in a timely manner.
- Complete the annual Client Organizer and promptly sign Form 8879 for e-filing authorization.
- Retain all supporting documentation for at least 7 years

The Client understands and acknowledges that failure to provide accurate or timely information may result in penalties, interest, or disallowance of deductions/credits, for which the Firm shall not be held responsible.

Compensation and Payment Terms

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

- Payment in full is due prior to the filing of any return.
- The Firm reserves the right to withhold submission of returns until payment is received in cleared funds.
- Additional fees may apply for amended returns, prior-year corrections, or audit assistance.
- The Firm reserves the right to charge late fees or suspend services in cases of delinquent payment.

Additional charges may apply for bookkeeping, prior-year corrections, IRS representation, or amended returns.

Full payment is required before e-filing. Late payments may incur additional fees.

Limitation of Liability

The Firm will exercise due professional care and diligence in performing services under this Agreement. However, ultimate responsibility for the accuracy of the filed return rests with the Client. The Firm shall not be liable for any penalties, interest, or damages arising from inaccurate, incomplete, or untimely information provided by the Client.

The Firm's liability, if any, shall not exceed the amount of fees paid for the specific services rendered under this Agreement.

Confidentiality and Data Protection

The Firm shall maintain strict confidentiality with respect to all Client information and records, except as required by law or authorized in writing by the Client.
All data will be stored securely in accordance with IRS regulations, federal privacy laws, and applicable professional standards.

Term and Termination

This Agreement shall commence on the date signed by both parties and shall remain in effect until the completion of services, unless terminated earlier by either party in writing.
In the event of termination, the Client shall be responsible for payment of all fees accrued for services performed up to the date of termination.

Governing Law and Jurisdiction

This Agreement shall be governed by and construed in accordance with the laws of the State of New York. Any disputes arising under this Agreement shall be subject to the exclusive jurisdiction of the courts located in New York County, New York.

Entire Agreement

This document constitutes the entire Agreement between the parties and supersedes any prior understandings, whether written or oral, relating to the subject matter herein.
Any modification to this Agreement must be made in writing and signed by both parties.

Execution and Acceptance

By signing below, the Client affirms that they have read, understood, and agreed to all terms set forth in this Engagement Agreement. The Client further acknowledges that they are legally bound by this Agreement and authorize DELAROSA PROFESSIONAL SERVICES INC to prepare and file tax returns on their behalf.

Client Signature: _____
Spouse Signature (if joint): _____
Firm Representative: _____

Date: _____
Date: _____
Date: _____