



# Cygnet Tax

Steven P Bigos, EA

251 Pawtuxet Avenue, Warwick, RI 02888

401-942-1040

[Info@CygnetTax.com](mailto:Info@CygnetTax.com)

## Cygnet Tax Client Engagement Letter

Name: \_\_\_\_\_

Phone # \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Thank you for choosing Cygnet Tax to assist you with your 2017 Income taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

Cygnet Tax will prepare your 2017 federal and state income tax returns. Cygnet Tax will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. Cygnet Tax has Organizer to help you collect the data required for your return. The Organizer will help you avoid overlooking important information. By using it, you will contribute to efficient preparation of your returns and help minimize the cost of our services. You may request an Organizer be mailed to you or you may download the Organizer on our website-[www.CygnetTax.com](http://www.CygnetTax.com).

We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will, of course, inform you of any material errors, fraud, or other illegal acts we discover. The law imposes penalties when taxpayers underestimate their tax liability. Call us if you have concerns.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

Our normal fee method is to base costs on the type of forms and schedules required, but if excessive time is required for preparing, researching or bookkeeping, you will be billed additional billing rates plus out-of-pocket expenses. Invoices are due and payable upon presentation. NO return will be e-filed or a completed return for mailing will be presented until paid for unless other payment arrangements are made. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (30) days.

We will return your original records to you at the end of this engagement. You should securely store these records, along with all supporting documents, canceled checks, etc., as these items may later be needed to prove accuracy and completeness of a return. We will retain copies of your records and our work papers for your engagement for four years, after which these documents will be destroyed.

Our engagement to prepare your 2017 Income tax returns will conclude with the delivery of the completed returns to you (if paper-filing), or your signature and our subsequent submittal of your tax return (if e-filing). If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them.

Your returns may be selected for audit by a taxing authority. Any proposed adjustments are subject to appeal. In the event of a tax examination or inquiry, Cygnet Tax can arrange to be available to represent you. Such representation will be a separate engagement for which an engagement letter will be provided to you. Fees and expenses for defending the returns will be invoiced in accordance with terms we agree on for that engagement.

You agree that you will provide us with additional information requested to prepare your returns within 5 days after requested, and you understand and acknowledge that it is not Cygnet Tax's responsibility to follow up with you in the event that you do not provide us with information that we need to complete your returns. You will contact us immediately if you discover additional information that will lead to a change in your tax returns, or if you receive any correspondence regarding your tax returns. Cygnet Tax is only responsible for penalties and interest up to the value of your income tax preparation fee, if Cygnet Tax omitted data or was erroneous in preparing your income tax return.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign.

Sincerely,  
Steven P Bigos, EA  
Cygnet Tax

Accepted By:

\_\_\_\_\_  
Taxpayer

Email: \_\_\_\_\_

\_\_\_\_\_  
Spouse

Email: \_\_\_\_\_

\_\_\_\_\_  
Date



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## CONSENT TO DISCLOSE OR CONSENT TO USE FORM 1040 TAX RETURN INFORMATION REQUIRED BY SECTION 7216(a)

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose, without your consent, your tax return information to third parties for purposes other than the preparation and filing of your tax return and, in certain limited circumstances, for purposes involving tax return preparation. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form. Because our ability to disclose your tax return information to another tax return preparer affects the service that we provide to you and its cost, we may decline to provide you with service or change the terms of service that we provide to you if you do not sign this form. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year.

Duration of consent (optional): \_\_\_\_\_

I, \_\_\_\_\_, authorize Steven P Bigos, Enrolled Agent, D/B/A Cygnet Tax to disclose [specify tax return information to be disclosed]

Prior Year, Current Year and Estimating Future Tax and Financial Information

Other

to [identify the recipient of the tax return information]

Name: \_\_\_\_\_

Business Name: \_\_\_\_\_

Address, City, State, Zip \_\_\_\_\_

for the purpose of [specify the intent of the disclosure]

Income Tax Advising, Estimating and Preparation

Other

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

I hereby consent and give my authorization as stated above.

\_\_\_\_\_  
Taxpayer

\_\_\_\_\_  
Spouse

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date