Cornelius, Schou & Leone, LLC
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Jacksonville, FL 32216
904-642-1794

IMPORTANT UPDATES - MUST BE SIGNED & RETURNED

2018 Income Tax Preparation Engagement Letter

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements.

We will prepare your 2018 federal and requested state/local income tax returns from information that you will furnish to us. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification on some of the information. We will furnish you with a client organizer (enclosed) to guide you in gathering the necessary information. Your use of such forms will assist in keeping pertinent information from being overlooked.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all of the original documents, canceled checks and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. As a taxpayer, you have the final responsibility for the income tax return(s) and, therefore, you should review them carefully before they are filed.

The filing deadline for the 2018 tax return is **April 15, 2019**. In order to meet this filing deadline, the information needed to complete the return should be received by us no later than **April 1, 2019**. If we have not received your information by this date, we cannot guarantee the completion of your tax return (s) prior to April 17, 2018. If necessary, we can apply for an automatic extension of time to file your tax return(s). If an extension of time is required, any tax that may be due with the return must be paid with that extension. Any amounts not paid by the filing deadline are subject to interest and late payment penalties when those amounts are actually paid.

Your returns may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination, we will be available upon request to assist you. Please contact us immediately upon receipt of any IRS notice.

Certain communications involving tax advice between you and our firm may be privileged and not subject to disclosure to the IRS. By disclosing the contents of those communications to anyone, or by turning over information about those communications to the government, you may be waiving this privilege. To protect your rights, please consult us or your attorney prior to disclosing any information about our tax advice.

Electronic filing will be standard for all returns prepared unless a specific state or local return does not have electronic filing capabilities. This will also apply to returns with a balance due - you will have the option to send the IRS a check via USPS or have the funds directly withdrawn from your bank account on the date you specify. This is a mandated rule that the Internal Revenue Service has put in place. **Form 8879** is available online or on our website (www.cslcpajax.com - under the "Resources" tab) and will need to be filled out, signed and returned with this engagement letter to our office before your return is e-filed. If you wish, we can provide you with a draft copy of your return before it is e-filed - please indicate below as an additional request.

We have available to our clients a Client Portal feature on our website that can be used as a secure place to "store" your tax return copies and documents. It will allow you to print your client copy or save it to your computer as you wish. **The Client Portal is an option of providing you a client copy of your return.** If you wish to receive the client copy using our Client Portal, please indicate below as an additional request - you will be sent a username and password as well as instructions on how to log in and use the portal. We assure you that our Client Portal service is completely secure. We can also provide a client copy in the form of a paper copy.

Please provide us with an email address below, so you will receive updates from our portal system as well as the status of your e-filed tax return.

If the foregoing fairly sets forth your understanding, please sign below and return to our office.

We want to express our appreciation for this opportunity to work with you.

Sincerely,

Cornelius, Schou & Leone, LLC

The undersigned hereby authorizes Cornelius, Schou & Leone, LLC and all of its representatives, agents and employees to furnish my/our full and complete personal financial information and documents as necessary to those personnel connected with preparing and reviewing my/our federal and/or state tax return(s), amendments or other tax services that are required/ requested.

Accepted By:________________________________ ________________________________
Taxpayer Signature Printed Name

________________________________ ________________________________
Spouse Signature Printed Name

Date:____________________ Email: ________________________________
(**WE MUST HAVE YOUR EMAIL ON FILE**).

Comments / additional requests (your comments are important to us, so please include information (positive or negative) you feel is important for us to address):

Select (√)	Process	Comments
	I would like to use the Client Portal	
	I would like to see a DRAFT of my return before it is e-filed	

____________ (please initial) If applicable, I want my balance due withdrawn from my bank account (please attach a voided check).

____________ (please initial) I would rather pay with a check using USPS on the date I specify.

*****NEW FOR THE 2018 TAX YEAR*****

We must receive a voided check or your bank's name, routing number, and your account number. The IRS software we use removes your bank account information each year, which requires us to obtain this info from you. If we do not receive this information, your refund WILL NOT be direct deposited.