



PO Box 151, NJ 07420
Phone/Text: 973-934-2500 Fax: 973-447-3555
dedicated-taxes.com info@dedicated-taxes.com

PRIVACY POLICY

Dear Client,

Your privacy is very important to us. Please read the following privacy policy.

We collect nonpublic personal information about you from various sources, including:

- Interviews regarding your tax situation
- Applications, organizers, or other documents that supply such information as your name, address, telephone number, Social Security Number, number of dependents, income, and other tax-related data
- Tax-related documents you provide that are required for processing tax returns, such as Forms W-2, 1099R, 1099-INT and 1099-DIV, and stock transactions

We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as requested by our clients or as required by law.

We restrict access to personal information concerning you, except to our employees who need such information in order to provide products or services to you.

We maintain physical electronic, and procedural safeguards that comply with federal regulations to guard your personal information.

If you have any questions about our privacy policy, contact our office at (973)934-2500.

Sincerely,
Dedicated Taxes



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ENGAGEMENT LETTER

Dear Client,

Subject: Preparation of Your Tax Returns

Thank you for choosing Dedicated Taxes to assist you with the preparation of your income tax returns. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your federal and state income tax returns. We 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. A Tax Checklist will be provided to you and is available on our website, dedicated-taxes.com, which will help you collect the data required for your return and give us important information required for the preparation of your returns. The Tax Checklist will help you avoid overlooking important information. By using it, you will contribute to the efficient preparation of your returns and help minimize the cost of our services.

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 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 about such penalties.

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 fees are based on prices set in our Fee Schedule, which is available on our website, and adjusted by time spent and complexity to prepare your returns. Invoices are due and payable upon presentation. Prepared tax returns will not be electronically filed until payment is received in full. All accounts not paid within thirty (30) days are subject to interest charges to the extent permitted by state law. Should the case arise that you are not satisfied with your tax preparation, the tax documents you originally provided to us will be returned to you and there will be no charge.

Also, at the end of this engagement, we will return your original records to you. Store these records, along with all supporting documents, in a secure location. We retain digital copies of your records for up to seven years, after which these documents will be deleted. If you have taken advantage of our secure client portal,

documents you upload along with documents and tax returns uploaded by us will remain there for a period not longer than three (3) years. We encourage you to bookmark the portal login page (or find the login link on our webpage dedicated-taxes.com/portal) so that you will always have your tax documents conveniently available to you. We also ask that you download and save onto your own computer all of your documents before the three-year expiration date.

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. Our engagement to prepare your tax returns will conclude with the delivery of the completed returns to you, or with e-filed returns, with your signature and our subsequent submittal of your tax return.

Our Tax Checklist, which is required to be filled out by you, directs you to our website where this Privacy Policy and Engagement Letter are digitally provided for your review. By filling out our Tax Checklist, you affirm you have read our Privacy Policy and this Engagement Letter and that this letter correctly summarizes your understanding of the arrangements for this work.

Thank you for the opportunity to provide you with the most outstanding service that we endeavor to provide to you. Should you have any questions regarding this Engagement Letter, please contact our office at (973)934-2500.

Sincerely,
Dedicated Taxes

We thank you for partnering with us! Your business is very much appreciated!