



107 West Main Street, Suite 102
Clinton, NJ 08809
(908) 894-5582
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To our most valued clients,

Thank you for choosing our firm to prepare your income tax returns for the **2023** tax year. This letter confirms the services we will provide.

We will prepare your federal and state returns for the **2023** tax year based on information you provide. Although our work will not include procedures to discover irregularities or inaccuracies in the tax data you provide, we may ask for clarification of certain information, or additional information, so that we can prepare accurate and complete returns for you. We are not responsible for missing tax information.

It is your responsibility to provide all necessary tax information related to income and deductions for the **2023** tax year, and to **respond to our inquiries in a timely manner** that we are able to accurately complete your returns by the Federal due dates. Our Extension Deadline is April 1st fee applies **Please Initial _____**

You are responsible for maintaining appropriate records, such as official tax documents you receive, receipts and substantiation for your deductions, and purchase and sales information for assets.

It is your responsibility to review your returns before they are e-filed to determine that all income that has been correctly reported and that you have substantiation for your deductions. Filing your returns by their respective due date is your responsibility. Rejected returns require review. **Please Initial _____**

If your returns are selected for review or audit by the taxing authorities, we will be glad to assist or represent you if you desire. Our fees for preparing your tax returns do not include time that will be necessary to assist you during a taxing authority review or amending returns. You will be invoiced separately for all other additional services. Requesting additional copies of returns a fee will apply.

Our fees for preparation of your returns are based upon our standard billing rates. Our invoices are due and payable upon presentation. *All Tax planning requests for the tax year **2024** will be invoiced separately.*

If this letter accurately summarizes your understanding of our agreement relating to the preparation of your tax returns, and additional requests, **please initial, sign and date** the enclosed copy in the space indicated and return it to us.

Thank you again for choosing our firm to prepare your **2023** tax return. We appreciate your business and we look forward serving you with excellence.

Sincerely,

Cornerstone Tax Services, LLC.

Accepted by client:

Date _____ 2024

Signature

Print Name