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## Tax Engagement Letter

Thank you for choosing The Reliant Group, Inc. to assist you with your 2025 tax preparation. This letter outlines the terms of our engagement and describes the scope of the services we will provide.

We will prepare your 2025 federal and state income tax returns based on the information you provide. It is your responsibility to supply complete and accurate data. While we may request clarification regarding certain items, we will not audit, verify, or independently investigate the information submitted.

You will receive a tax organizer to help you gather the necessary information. Thorough completion of this organizer will help ensure that your returns are accurate, efficiently prepared, and completed at the lowest possible cost.

We will perform accounting services only to the extent necessary to complete your tax returns. This engagement does not include procedures designed to detect errors, fraud, or other irregularities. Although we do not specifically search for such issues, we will inform you if we become aware of any material errors, fraudulent activity, or illegal acts during the preparation process.

Please be aware that tax law imposes penalties for underpayment of tax. If you have concerns about potential penalties, we encourage you to contact us for guidance.

If we encounter areas where the tax law is unclear or subject to differing interpretations, we will discuss the available options with you, including the associated risks and potential consequences. We will ultimately proceed with the option you select.

Our fees are based on the time, complexity, and professional judgment required to prepare your tax returns. As a general reference point, a standard individual income tax return — typically a single filer with limited sources of income and no unusual tax issues — is often approximately \$400, though actual fees may vary based on your specific circumstances. After reviewing your completed tax information, we will determine the scope of work required. If your return involves additional forms, schedules, or complexity beyond a standard return, we will notify you in advance. Any additional services will be billed at our standard hourly rate, plus any applicable out-of-pocket expenses.

Initial

Upon completion of our engagement, we will return your original documents to you. Please store these records, along with all supporting documents, in a secure location. We retain copies of your records and our work papers for up to seven years, after which they will be securely destroyed. If you choose **not** to have us electronically file your returns, you will be solely responsible for filing them with the appropriate tax authorities. Please review all tax-return documents carefully before signing. Our engagement concludes upon delivery of your completed returns to you or, for e-filed returns, upon your signature and our subsequent submission of the return.

### Our Tax Preparation Process

To ensure accuracy, efficiency, and timely filing, our office follows the process below:

1. Sign the tax engagement letter and complete the tax organizer. These can be securely uploaded through the Tax Dome portal or dropped off at our office.
2. Provide all necessary tax documents. Again, these can be securely uploaded through the Tax Dome portal or dropped off at our office. We do not keep the documents, all documents will be scanned while you wait, please plan accordingly.

3. We will prepare your return, once all documents and information have been received.
4. Return Review. When the return is complete, we will send it to you for review.  
If everything is accurate, you will sign Form 8879, authorizing us to electronically file your return.
5. Invoice & Filing: Once we receive both your **signed Form 8879** and **payment of your invoice cleared (1 - 3 business days)** we will e-file your return.

Please note that **we do not file local tax returns**. Local tax information will be included in your completed tax packet; however, it is the client's responsibility to file local returns directly with the appropriate municipality. Initial

To protect you from potential penalties, **extensions will be automatically filed** when your return is not ready to be filed by the deadline due to missing documents, outstanding information, or other delays. An extension moves the *filing* deadline, not the *payment* deadline. Any anticipated tax owed should still be paid by the original due date to avoid interest or penalties.

**Your Privacy is important to us**

We collect nonpublic personal information about you from a variety of sources, including but not limited to:

- Information gathered during interviews or discussions with you regarding your tax situation
- Applications, organizers, or other documents that supply such information as your name, address, telephone number, Social Security Number, number of dependent, 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, 1099-DIV, stock transaction statements, and similar documentation

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.

Access to your personal information is strictly limited to employees who need the information to provide services for you. We maintain physical, electronic, and procedural safeguards in accordance with federal regulations to protect the confidentiality and security of your information. If you have any questions about our privacy policy, contact our office at (513) 424-6035.

To confirm that this letter accurately reflects your understanding of the engagement, please sign and return the enclosed copy.

(Both spouses must sign for preparation of joint returns.)

**Accepted by:**

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Taxpayer Print Name	Taxpayer Signature	Date

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Spouse Print Name	Spouse Signature	Date

Sincerely,

Tax Department, The Reliant Group, Inc.

**Thank you for the opportunity to serve you.**