



WSF Tax Group

Westside Fiduciary Services, LLC

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Engagement Agreement

This Agreement is between Randy Redmond, EA, (WSF Tax Group / Westside Fiduciary Services, LLC) and _____ (Print Name(s) of individuals or company) for the preparation of 2024 federal and state income tax returns:

We will prepare your federal and state income tax returns for the tax year noted above. We will prepare your returns based on the information you provide. You agree that you will provide all requested documents and answer all questions truthfully and fully so we can accurately prepare your returns. Preparation of your tax returns does not imply any verification or other assurances related to the information you provide, and we will not perform any auditing functions related to this engagement. You acknowledge that it is your responsibility to provide all documentation and verification of items on your returns in the case of an audit or other inquiry from a government agency. Note that some items such as auto expenses, travel expenses, and certain charitable contributions require contemporaneous written records to allow a deduction.

We are required by law to file most tax returns electronically. If your return cannot be filed electronically, or you request a waiver from the electronic filing requirement, we may require your approval and signature on a waiver document. In this case we will supply you with paper copies and envelopes for sending to the appropriate Federal and State agencies. In addition to preparing your returns for filing, we will supply you with a digital and/or paper copy of the returns for your records.

For preparation and filing services you will be charged according to our fee schedule. Unless other arrangements have been made in advance, we require full payment of preparation fees prior to filing your returns.

This agreement covers only the preparation of your tax return and does not apply to services related to an audit of the return by a government agency, additional correspondence with a government agency, or other services that may be required after filing of your returns. If additional services are required, a separate agreement will be required.

Privacy Notice and Compliance with the Gramm-Leach Bliley Act of 1999

In order to meet the requirements of the Gramm-Leach-Bliley Act of 1999, I am including this section to make certain you are aware of the privacy policy of this firm.

It is the policy of WSF Tax Group and Westside Fiduciary Services, LLC to handle the information you provide us with the utmost confidentiality and care. We restrict access to non-public personal information about you to members of our firm who need to know this information in order to complete the work you have hired our firm to do. We will not disclose your personal and confidential information to anyone outside our firm without your express written permission to do so.

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

Mandatory Internal Revenue Code 7216 Disclosure and Consent

Federal law requires tax professionals to obtain the taxpayers' consent to disclose tax return information to third parties for any purpose other than the preparation and filing of your tax returns. We obtain this consent from you with the Internal Revenue Code Section 7216 Disclosure and Consent. It is a separate form included with this Agreement.

I/We have read and agree to the terms of this agreement:

Dated: _____

Dated: _____

Signature

Signature

Print Name and Title (if applicable)

Print Name and Title (if applicable)

Internal Revenue Code Section 7216
Disclosure and Consent

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use your tax return information for purposes other than the preparation and filing of your tax return without your consent.

You are not required to complete this form. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. 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.

Taxpayer hereby consents to the use by Randy Redmond, EA, (WSF Tax Group dba Westside Fiduciary Services, LLC) of any and all tax return information contained in the taxpayer's federal income tax returns (Forms 1040, 1040NR, 1040A, 1040EZ, etc. and supporting schedules) for the purpose of mailing, including electronic transmission, to the taxpayer information pertaining to:

- Newsletters of accounting firm/preparer
- Tax planning information
- Tax resolution matters
- Other areas that the tax preparer offers

The tax information may not be disclosed or used by Randy Redmond, EA, (WSF Tax Group / Westside Fiduciary Services, LLC) for any purpose other than that permitted by this consent document.

Dated: _____

Dated: _____

Signature

Signature

Print Name and Title (if applicable)

Print Name and Title (if applicable)

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 by email at complaints@tigta.treas.gov.