TAX RETURN PREPARATION ENGAGEMENT LETTER

Dear Client:

Thank you for selecting M&G Tax Services to assist you with your tax affairs. This letter informs you, the taxpayer, of the services we will provide and your responsibilities regarding the preparation of your tax return.

* We will prepare the 2024 Federal and State Income Tax Returns you requested using your provided information. Services for preparing your return do not include auditing or verifying the information you supplied.
* Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities. In the event of a tax examination, we can arrange to represent you. Such representation will be a separate engagement for which an engagement letter will be provided to you.
* The only accounting or analysis work we will do is that which is necessary for the preparation of your income tax returns. The tax return preparation fee does not include bookkeeping.
* Preparation fees do not cover assistance or consultation during the year. If you need me to call the IRS regarding a letter you receive, I will charge an extra fee.
* The engagement to prepare your 2024 tax returns terminates upon delivery of your completed returns and original documents. Please securely store your supporting documents and copies of your tax returns for at least seven years. You may be assessed a fee if you request a copy in the future.

*Taxpayer Responsibilities*

* You are responsible for providing the information required to prepare complete and accurate returns. You should keep all documents, canceled checks, and other data that support your reported income and deductions. They may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You are responsible for the returns, so you should review them carefully before you sign them.
* You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask you to review your documentation.
* You must review the return carefully before signing to ensure the information is correct.
* Fees must be paid before your tax return is delivered or filed. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required to prepare late returns.

We will retain copies of the records you supplied to us along with our work papers for your three-year engagement. After three years, our work papers and engagement files will be destroyed. All your original records will be returned to you at the end of this engagement. You should keep the original documents in secure storage.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign the enclosed copy of this letter in the space indicated.

To comply with California regulations, I will show you the CTEC web page before this letter, along with my name, address, phone number, and bond number. The signature below is also an agreement to see the information.

We appreciate your confidence in us. Please call if you have questions.

Sincerely,

M & G TAX SERVICES

Luz Elena Mariscal Casillas, EA

Enrolled Agent, CRTP, Notary Public

Signatures. By signing below, you acknowledge that you have read, understand, and accept your obligations

and responsibilities and that you understand our responsibilities in preparing your tax returns as

explained above. For a joint return, both taxpayers must sign.

• You should keep a copy of your tax return and any related tax documents. You may be assessed a fee if

you request a copy in the future.

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Taxpayer Spouse Date

Privacy Policy. The nature of our work requires us to collect certain nonpublic personal information

about you from various sources. We collect financial and personal information from applications, worksheets,

reporting statements, and other forms, as well as interviews and conversations with our clients

and affiliates. We may also review banking and credit card information about our clients regarding the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by

you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access

to your confidential information to those within our firm who need to know how to provide services. We will not disclose your personal information to any third party without your express permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.

Please contact us with any questions regarding our privacy policy.