
STRATEGIC TAX GROUP

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www.strategictaxgroup.com

Welcome to Strategic Tax Group. We are delighted that you have selected us as your tax professional. We are committed to providing you with the very best tax and consulting service, and we look forward to a long and mutually rewarding relationship.

We advise both individuals and business on all aspects of compliance with the tax laws, as well as tax planning. We are qualified to provide a wide range of tax services to meet your current and future needs. We prepare tax returns and related schedules, provide advice on tax issues, help individuals and businesses plan effective tax strategies, and represent taxpayers before taxing authorities.

At your leisure, we invite you to read our Privacy Policy and the Tax Engagement Letter. Our goal is to effectively communicate with our clients for a successful professional relationship. Please let us know if you have any questions or concerns with these items.

As a service business, we are dependent on referrals from satisfied clients and we are equally committed to providing your referrals with the same professional care and enthusiasm that you are provided. If you know of anyone who might benefit from our services, please feel free to have them call our office to speak with one of us.

Strategic Tax Group is dedicated to providing prompt and courteous service of the highest standards. Please feel free to contact us anytime with your questions or issues. Thank you again for selecting us to meet your tax and consulting needs.

Sincerely,

Strategic Tax Group

Tax Engagement Letter

This is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. This engagement does not include any services not specifically stated in this letter. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to review and be aware of the following arrangements.

We will prepare your 2017 federal and required state income tax returns from information which you will furnish to us. We will not audit or otherwise verify the information you submit, although it may be necessary to ask you for clarification of some of the information. We will furnish you with questionnaires and/or worksheets to guide you in gathering the necessary information. Your use of such forms will assist in minimizing our fees.

It is your responsibility to provide all the information necessary for the preparation of complete and accurate returns. You should retain all the documents, canceled checks and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them.

We will use professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in more-likely-than-not standard whenever possible.

Your returns may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of a government tax examination, we will be available to assist you in connection with such examination and will bill you for the additional time and expenses incurred in rendering such assistance.

Our fee for services rendered generally will be based upon the complexity of the assignment and the amount of time expended billed at standard billing rates, plus out-of-pocket expenses. However, our fees may be adjusted from time to time in our sole discretion based upon other factors deemed relevant including, but not limited to, the difficulty of the questions and the skill required to perform the services hereunder, the time limitations imposed by you or the circumstances, and the nature and length of the professional relationship between us.

All invoices for services rendered are due and payable upon presentation. A late payment charge of 1% per month (12% per annum) may be assessed on any unpaid balance, after deduction of current payment, credits, and allowances after thirty (30) days from the date of the invoice.

Please be advised that by submitting any information to us for the purposes of allowing us to begin our review and preparation of your income tax returns, you shall be deemed to have accepted and agreed to the terms and conditions contained in this letter.

We want to express our appreciation for this opportunity to work with you. Any statements contained herein are not intended or written by Strategic Tax Group to be used, and nothing contained herein can be used by you or any other person, for the purpose of avoiding penalties that may be imposed under Federal Law.

Strategic Tax Group
Dallas, Texas

Strategic Tax Group Privacy Policy

We collect non-public personal information about you from the following sources:

- Information we receive from you on applications, tax preparation worksheets, other documents we use in preparing your tax return, or other forms
- Information about your transactions with us or others
- Information we receive from a consumer reporting agency

We do not disclose any non-public personal information about you to anyone, except as permitted by law.

If you decide to become an inactive customer, we will adhere to the privacy policies and practices as described in this notice.

We restrict access to your personal and account information to those employees who need to know that information to provide products or services to you. We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your nonpublic personal information.

Your confidence in us is important and we want you to know that your personal information is safe. If you have any questions or concerns, please contact us.

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