



LONG LAW GROUP, LLC

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Dear Client:

This letter confirms the services we will provide in preparing your 2017 federal and state (if applicable) personal and/or business income tax return(s). We want to provide you with a written understanding of what we will do in connection with your tax return preparation.

You agree to furnish all the information that is necessary for the preparation of the above tax return(s), and represent that the information you are supplying is accurate and complete to the best of your knowledge. The written and oral information supplied by you will be the only source of information for the preparation of your return(s), and we will not independently verify your information. Our work in connection with the preparation of your income tax return(s) does not include any procedures designed to discover defalcations or other irregularities, should any exist. In the event of an audit by the taxing authorities, you may be asked to produce documents, records, or other evidence to substantiate the items of income and deductions shown on the tax return(s).

Even though we are attorneys who prepare your income tax returns, the privilege that normally applies via the attorney-client relationship, will not apply for the work we do as tax preparers. The IRS Restructuring and Reform Act of 1998 extended the attorney-client privilege to certain communications between you and your Tax Preparer. However, the communications must be in connection with tax advice and must be such that they would be privileged if made by you to us as your lawyer. Again, communications concerning the preparation of a tax return will not be privileged. In addition, your confidentiality privilege can be inadvertently waived if you discuss the content of the privileged communications with a third party. This privilege for communications between you and your Tax Preparer only applies to non-criminal tax matters before the IRS and non-criminal tax proceedings brought by or against the government in any federal court.

Our fees for tax preparation services will be computed based on a flat fee basis depending on the amount of forms and schedules we prepare and the complexity of the return preparation. Please see our tax organizer for our price sheet. Please note that once we commence on your tax preparation file fees will begin accruing depending on the tax work completed.

Time spent directly related to the preparation of your taxes is already included in the flat fee you pay to us to have your taxes prepared. However, you may have other tax or business issues or questions that arise outside of the scope of your tax preparation. We will be available to answer your inquiries on specific tax matters and to consult with you regarding income tax and business planning. *Please be advised that any time we spend to answer questions or provide tax or business planning will be billed to you at our normal hourly rates billed in quarter-hour increments.* Such billing includes time spent answering email questions, telephone conferences, replying to IRS and state notifications, and in-person consultations.

The following are our current billable rates:

Stephanie F. Long, Esq.: \$300.00 per hour  
Peter McFarland, Esq.: \$240.00 per hour  
Brian Woldt, CPA: \$150.00 per hour  
Maggie Lugo, Enrolled Agent/Bookkeeper: \$80.00 per hour  
Stephanie Ashworth, Paralegal: \$125.00 per hour

Invoices are due upon receipt and please note taxes will not be released until your invoice is paid in full. Interest will also be charged beginning 30 days after the billing date at the rate of 1.5% a month on all outstanding balances with a \$5 minimum charge.

Tax returns are subject to audit and possibly challenged by the Internal Revenue Service, which may result in additional assessments of tax, interest and in certain cases, penalties. Generally, an assessment by the taxing authorities is presumed to be correct and must be rebutted by the taxpayer. You understand that we do not assume responsibility for such assessments and, if you would like us to assist you in connection with the audit of your return(s), there will be an additional fee for our services based on our hourly rate, as noted above. If you are assessed penalties or interest by a taxing authority, through no fault of our firm, we can attempt to abate them if you desire. The fee for this service is based on our normal hourly billing rates.

**Technology Disclosure:** To enhance the efficiency of our practice, the firm uses a variety of technology, including third party cloud-based platforms, to store documents, communicate with clients, and engage in other activities related to representing our clientele. We have exercised due care in selecting vendors whose security and management practices meet or exceed applicable ethics requirements and engage in ongoing monitoring and oversight of their services. Client consents to the firm's use of these services to store Client's files, communicate with Client, and carry out other necessary tasks related to Client's representation.

If the above correctly sets forth our understanding, please sign the copy of this letter and return it to us. Please keep a copy of this letter is for your records. We look forward to being of further service to you.

Sincerely,  
**Long Law Group, LLC**  
Attorneys and Counselors at Law

Accepted by (for individual returns)  
Print Name: \_\_\_\_\_  
Signature: \_\_\_\_\_  
Date: \_\_\_\_\_  
Print Name (Spouse): \_\_\_\_\_  
Signature (Spouse): \_\_\_\_\_  
Date: \_\_\_\_\_

Accepted by (for business returns)  
Print Name: \_\_\_\_\_  
Signature: \_\_\_\_\_  
Date: \_\_\_\_\_  
Company Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Date: \_\_\_\_\_