

# Engagement



## Client Engagement Agreement

Posted Sunday, December 31, 2023

The IRS, American Institute of Certified Public Accountants (AICPA) and our Professional Liability Insurance provider are getting more stringent on Client Engagement Agreements. They can be demanding that way. To ensure compliance and continued service, please help us by returning this document to us. It helps outline what you can expect from **WCG CPAs & Advisors** and what we expect from you. It is a healthy way to start a relationship.

Also, for our Business Advisory Services and Tax Patrol Services (BAS/TPS) clients, our proposal does not constitute an engagement agreement for tax return preparation (sorry).

**For 2023 tax returns due in 2022**, we offer two versions; digital form and non-fillable PDF. Please review and provide acceptance so we may start the preparation of your tax returns.

We also have a “combo” engagement agreement for those individuals who also own a business that files a business entity tax return (corporation or partnership). Use the buttons below to download the PDF versions of above, sign and then upload to your Sharefile.

## Client Communication Preferences

We are excited to be working with you in preparation of your tax returns. Relationships are primarily about communication, right? This is optional, but if you can spare a few minutes please review and complete our simple digital form outlining your communication preferences. We might still leave wet towels on the floor, but at least we'll be better with our communications.

## Prior Year Engagement Agreement

These engagement agreements are for prior year tax returns, and are available as PDFs and online digital forms. The filing deadline for prior year tax returns has passed, and therefore will be considered late by the taxing agencies. **WCG CPAs & Advisors** is a boutique and progressive Colorado CPA firm specializing in tax return preparation and small business consultation.