

[Engagement](#)

Client Engagement Agreement

Posted July 24, 2019

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 us and what we expect from you. It is a healthy way to start a relationship.

Also, for our Business Services Agreement (BSA) clients, our proposal does not constitute an engagement agreement for tax return preparation (sorry).

We offer two versions; digital form and fillable PDF. Please review and provide acceptance so we may start the preparation of your tax returns.

[2019 due in 2020](#)

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.

[2018 due in 2019](#)

[2017 due in 2018](#)

[2016 due in 2017](#)

[2015 due in 2016](#)

[2014 due in 2015](#)