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Subject: 2023 Tax Return Engagement Letter

Thank you for choosing Broussard Financial LLC to assist you with your tax affairs. This letter confirms the terms of our engagement with you and the nature and extent of the services we will provide.

We will prepare your 2023 and all state income tax you request using information you provide to us. We may ask for clarification of some items, but we will not audit or otherwise verify the data you submit. It will help you avoid overlooking important information and contribute to accurate and efficient preparation of your returns. It will also keep the cost of our services as low as possible.

It is your responsibility to provide information required for preparation of 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 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 the form 8879 authorization.

Our work will not include any procedure to discover defalcations or other irregularities. The only accounting or analysis work we will do is that which is necessary for preparation of your income tax returns. If we discover any errors or omissions on a prior return, we will bring them to your attention.

We must use our 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. In order to avoid penalties, we will apply the more-likely-than not reliance standard to resolve such issues. You agree to honor our decisions regarding the need to make protective disclosures in your returns.

The law also imposes penalties when taxpayers understate their tax liability. If you have concerns about such penalties, please call us.

Your returns may be selected for audit by a taxing authority. Any proposed adjustments are subject to appeal. In the event of a tax examination, we can arrange to be available to represent you. Such representation will be a separate engagement for which an engagement letter will be provided to you.

Fees and expenses for defending the returns will be invoiced in accordance with terms we agree on for that engagement.

Our fee for preparation for your tax returns will be based on standard billing rates plus out-of-pocket expenses. All invoices are due and payable upon presentation. To the extent permitted by state law, an interest charge may be added to all accounts not paid within (30) days.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign this letter in the space indicated and return it to us, along with your Organizer in the envelope provided. If our firm does not receive this letter from you in fully executed form, but receives from you a completed copy of the enclosed Organizer and/or supporting documentation requested then such receipt by this office shall be deemed to evidence your acceptance of all of the terms set forth above.

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

Sincerely,

Gwen Broussard
Broussard Financial LLC

(both taxpayer and spouse must sign for preparation of joint tax returns)

Accepted By: (Taxpayer) _____

(Spouse) _____

Date: _____

	Taxpayer	Spouse
Drivers License Number	_____	_____
Issue Date	_____	_____
Expiration Date	_____	_____

Direct Deposit

Bank Name/ Routing Number _____

Bank Acct Number _____