



STAR Tax Solutions, LLC

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Dear Client:

Thank you for selecting me to assist you with your tax returns. This letter confirms the terms of my engagement with you and the nature and extent of services I will provide.

I will prepare your **2023** federal and all state income tax returns you request, using information you provide to me. I may ask for clarification of some items, but I will not audit or otherwise verify the data you submit. I've enclosed an "Organizer" to help you gather the information required for a complete return. It will help you avoid overlooking important information and contribute to efficient preparation of your returns. This helps keep the cost of my services as low as possible. I do not file tax return extensions automatically for clients; as such, please notify in writing if you'd like me to file an extension for you.

In the interest of facilitating my services to you, I may communicate by facsimile transmission or send electronic mail over the internet. Such communications may include information that is confidential to you. While I will use my best efforts to keep such communications secure in accordance with my obligations under applicable laws and professional standards, you recognize and accept that I have no control over the unauthorized interception of these communications once they have been sent and consent to my use of these electronic devices during this engagement.

It is your responsibility to provide the information required for the 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 prove 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 them.

My work will not include any procedures to discover defalcations or other irregularities. The only accounting or analysis work I will do is that which is necessary for preparation of your income tax returns.

I must use my 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, I will apply the "more likely than not" reliance standard to resolve such issues. You agree to honor my 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 me. 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, I 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 the terms we agree upon for that engagement.

Prior to commencing our services, we require that you provide us with a retainer in the amount of **\$200.00**. The retainer will be applied against our final invoice, and any unused portion will be returned to you upon our collection of all outstanding fees and costs related to this engagement. My fee for preparation of your tax returns will be **\$_____**. My fee is based on the amount of time required at standard billing rates, periodically raised to adjust for inflation, plus out-of-pocket expenses. All invoices are due and payable upon completion of the tax return before it is filed. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (30) days.

I will retain copies of records you supplied to me along with my work papers for your engagement for a period of seven years. After seven years, my work papers and engagement files will be destroyed. All your original records will be returned to you at the end of this engagement. You should keep the original records in secure storage.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign on the last page of the tax organizer in the space indicated and upload it to the secure portal.

I appreciate your confidence in me. Please call if you have any questions.

Sincerely,

Harshita Pujara



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Life Events

- Yes No If you are due a refund, would you like a direct deposit?
 Yes No If you have a balance due, would you like direct debit?

During 2023, did you (and/or your spouse, if filing a joint return) have any of the following?

- Yes No Buy a home? If yes, closing date: _____
 Yes No Purchase and install energy efficient home items (such as solar panels, windows, furnace, insulation, etc.).
 Yes No Pay college tuition for yourself, your spouse, or any of your dependents.
 Yes No Have any student loans.
 Yes No Have health insurance for you, your spouse, and all dependents for the entire year.
 Yes No Have any bank accounts in foreign countries.
 Yes No Have balance/(s) greater than \$10,000 in any foreign bank account/(s).
 Yes No Make estimated tax payments or apply last year's refund to your 2023 tax? If yes, amount: _____

Income

During 2023 did you (and/or your spouse, if filing a joint return) receive:

- Yes No Wages or salary.
 Yes No Interest/dividends (from checking or savings accounts, CDs, bonds, brokerage accounts, etc.).
 Yes No State income tax refund.
 Yes No Self-employment income (such as small business, contract labor, hobby, etc.).
 Yes No Alimony income.
 Yes No Proceeds (or loss) from the sale of stocks, bonds, or real estate (including your home).
 Yes No Sell, send, exchange, or otherwise acquire financial interest in any virtual currency.
 Yes No Unemployment income.
 Yes No Pensions, annuities, and/or IRA distributions.
 Yes No Social security or railroad retirement benefits.
 Yes No Income from rental property.
 Yes No Other income: (gambling, jury duty, lottery, prizes, awards, etc.)? Identify: _____

Expenses

During 2023 did you (and/or your spouse, if filing a joint return) pay:

- Yes No Alimony? If yes, what is the recipient's SSN: _____
 Yes No Contributions to IRA, 401(k), or other retirement accounts, including employer retirement account.
 Yes No Rent for your personal residence.
 Yes No Medical expenses.
 Yes No Home mortgage interest.
 Yes No Real estate taxes for your home.
 Yes No Car/Motorcycle License registration fees? If yes, amount: _____
 Yes No Charitable contributions.
 Yes No Child/dependent care expenses.

I have examined this tax organizer and accompanying documentation, and to the best of my knowledge and belief, they are true, correct, and complete. I have included all the documentation necessary to prepare a true and complete federal, state, and local tax return. I agree to all terms of the engagement letter included with this organizer.

Your signature

Date

Spouse signature

Date

Both spouses must sign
for preparation of joint
tax returns.



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Direct Deposit/Direct Debit Approval Form

First Name: _____

Last Name: _____

Bank Name: _____

Savings Account Checking Account

Routing Number (9 Digits): _____

Account Number: _____

Date of direct debit transaction for balance due: _____

I would like to opt out of direct deposit/direct debit.

I have verified this information and assume full responsibility for its accuracy.

Signature: _____ Date: _____