



# Donahue Income Tax Services LLC

122 Baltimore Street Ste # 1

Gettysburg, PA 17325

P: (717)420-5557 [Andrew@donahuetax.com](mailto:Andrew@donahuetax.com) F: (717)420-5657

**ENGAGEMENT LETTER MUST BE SIGNED BEFORE TAX RETURNS WILL BE PREPARED!**

Dear \_\_\_\_\_, (2 full names if joint return to be filed)

Street Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

This letter confirms our agreement and outlines the terms of the services we will provide. Based on the information you furnish, we will prepare your 2025 Federal and applicable state and local income tax returns.

#### Tax Estimates and Vouchers

We will prepare 2026 estimated tax vouchers if required. Please advise us promptly of any substantial changes in your anticipated income or withholding so we may adjust these estimates accordingly.

#### Scope of Service

We will not audit or verify your data, though we may request clarification. You certify that all submitted information is correct and complete. Our services are not designed to discover defalcations or irregularities. Necessary bookkeeping assistance will be billed at our standard rates.

#### Professional Judgment and Representation

We will resolve questions regarding unclear tax laws in your favor whenever possible. If your returns are selected for examination, we are available to represent you or review the results for an additional fee at our standard rates.

#### Procedures and Fees

To ensure accuracy, tax returns will no longer be prepared during appointments. All documents must be dropped off or uploaded at least two weeks prior to your scheduled appointment. Failure to meet this deadline will result in a \$100.00 expedited preparation fee and may require filing an extension.

#### Payment

Fees are based on our standard schedule and the complexity of the return. Payment is due upon completion and presentation of the invoice. You may choose to have fees deducted directly from your tax refund.



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## Privacy and Data Retention

Your information will remain confidential and will only be released with your written authorization or as required by law. We retain records for three years before destruction. Original documents will be returned to you upon completion; it is your responsibility to retain these for your records.

## Foreign Accounts

Taxpayers with financial interests in or authority over foreign accounts exceeding \$10,000 at any point during 2025 must report such interests. Failure to disclose this information to us will result in the omission of required forms, for which we hold no responsibility. In the absence of disclosure, we will assume you have no such interests.

## Security Reminder

The IRS does not initiate contact via email. Please do not click on any suspicious links, as these are often identity theft attempts.

We appreciate the opportunity to work with you again this year.

Best regards,

Andrew C. Donahue E.A.

You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign forms that give your permission to electronically send the returns or before you sign and mail returns.

If the above is in accordance with your understanding of the terms and conditions of our agreement, please sign and return a copy of this letter.

Two signatures are required if joint tax return to be filed.

Accepted by: \_\_\_\_\_

Date: \_\_\_\_\_

Accepted by: \_\_\_\_\_

Date: \_\_\_\_\_

Thank You!