

Noseworthy Financial Services

Engagement Letter

Serving the local community since 1994

PRIVACY POLICY (effective 2014)

It is the policy of Richard A Noseworthy, MBA, to handle the information you provide us with the utmost confidentiality and care. Your personal information will only be shared with members of our firm or tax colleagues who work on behalf of our firm who need to know this information in order to complete the work you have hired our firm to do. We will not disclose your personal and confidential information to anyone outside our firm without your express written permission to do so or unless we are legally required to do so. We maintain physical, electronic and procedural safeguards to protect your information.

ENGAGEMENT OF SERVICES

We will prepare your current year (and prior years if requested) Federal & State individual income tax returns from the information that you furnish us. We will not audit the data you submit to us; however, we may ask you to clarify some of the information. It is your responsibility to provide all the information necessary to complete your tax returns and to maintain, in your records, the documentation (e.g., receipts, cancelled checks) necessary to support the items of income and deductible expenses claimed on your tax returns. These may be necessary to prove the accuracy and completeness of the returns to the taxing authority. Since you have final responsibility for the information on your tax returns, we highly recommend that you review the tax returns carefully before signing and filing them. If you have any questions as to the type of records required, please ask us for advice in that regard. You agree to submit all requested information within one week of such request and to pay for all services rendered at time of delivery.

IRS/STATE DOR CHECKBOX AUTHORIZATION

You may authorize the IRS or the Department of Revenue to contact your tax return preparer if they have any questions regarding the processing of your tax return after it is filed. Very often, questions that arise during processing can be easily resolved by telephone. If you agree, we will be authorized to answer those questions for you. This will be authorized under separate cover.

IRS e-file SIGNATURE AUTHORIZATION

With your permission, we can "sign" your electronically filed Federal tax returns with a Personal Identification Number (PIN). You will need to sign the IRS e-file Signature Authorization forms for both IRS and Massachusetts or other state.

Joint Filing Disclosure

By my signature below, I understand that if I am filing a Joint return, my signature is representative of both parties for claiming the deductions, dependents and all credits on this return.

Client Name Printed

Signature

Date Signed

Richard A Noseworthy, MBA