

**Engagement Letter  
2016 Tax Preparation**

As required by regulation and for purposes of clarity, we have included this engagement letter to confirm our understanding of the terms and objectives of the tax return preparation engagement and the nature and limitations of the services we will provide to you.

**Services Provided**

ATS Advisors will prepare the Federal, and any State and City, personal income tax return(s) for you for the calendar year ended December 31, 2016. We will prepare the return based on the records and other information you provide, and as we deem necessary. We will not perform any audit procedures to verify or corroborate the information supplied. As such you are responsible for the accuracy of the information we use to prepare the returns, we are responsible for the accuracy of the preparation of the return. Before filing, you should review the information relative to your income, deductions, and credits to determine that there are no omissions or misstatements.

**Health Care and the Affordable Care Act** - The individual mandate for health coverage has created an additional reporting requirement for all taxpayers required to file a return. If you purchased your insurance through the marketplace website you **MUST** have form 1095-A to complete your return.

**Charitable Contributions** - For the purposes of itemized deductions and charitable contributions of both a cash and non-cash nature, you the taxpayer are responsible for maintaining an accurate and complete record of donations made. Under tax regulations you acknowledge that you have a letter from the organization or a bank record of the donation reflecting the amount and date of the donation and that any non-cash items were in **“good used condition”** and that your donation receipt reflects that statement.

**Additional Due Diligence** – Due to changes in the internal revenue code and to combat identity theft and refund fraud you may be required to provide additional personal information with regards to your tax filings, including a copy of your driver’s license, information pertaining to credit claimed for college tuition, child tax credits and earned income tax credits. You the taxpayer are responsible for the accuracy of the information deemed necessary by us to complete your returns in compliance with the Internal Revenue Code. We are required to perform these extra due diligence steps in order claim the credits allowable.

***(Please sign on reverse side)***

Headquarters  
875 S Main St  
Plymouth  
Michigan 48170  
734.454.4100

Down River  
7915 Allen Rd  
Allen Park  
Michigan 48101  
313.388.7180

Northern Michigan  
P O Box 627  
Grayling  
Michigan 49738  
989.348.4055

West Metro  
35951 5 Mile Rd  
Livonia  
Michigan 48154  
734.462.6161

Oakland County  
2310 E 11 Mile Rd  
Royal Oak  
Michigan 48067  
248.399.7331

Eastside  
23000 Gtr Mack Ave  
Ste 500  
St. Clair Shores  
Michigan 48080  
313.371.6600

**Other Work**

We are happy to assist you with questions relating to your return and simple matters that may arise after filing the return. Our engagement ends upon delivery of the tax return and payment for services. Any follow-up services requiring substantial time (such as representing you in an IRS audit) are considered a separate engagement. The terms and conditions of that engagement will be governed by an engagement letter for that service.

**Payment Terms**

We will bill you our normal and customary fees for the tax preparation services provided. Accordingly, you will save expense if you provide complete, accurate, and organized accounting records. The fee is payable upon completion of the work, and is due before we will provide you with the return. We will notify you immediately of any circumstances we encounter that could significantly affect our normal fees and will not proceed without your consent.

If the tax services and terms outlined above are in accordance with your understanding of our engagement please sign and return the letter with your tax questionnaire and tax information.

Respectfully,



ATS Advisors  
A Certified Public Accounting Firm

**This engagement letter correctly sets forth our understanding of services to be provided:**

\_\_\_\_\_  
Taxpayer Signature

\_\_\_\_\_  
Spouse Signature *(if married filing jointly)*

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Printed Name

**\*\* PLEASE RETURN THE SIGNED ENGAGEMENT LETTER \*\***  
**\*\* WITH YOUR TAX INFORMATION. THANK YOU. \*\***