SCHUMAN SIMON & GRODECKI, LTD.
CERTIFIED PUBLIC ACCOUNTANTS | ACCOUNTING, TAX, CONSULTING
626 WEST JACKSON BLVD., SUITE 650 | CHICAGO, ILLINOIS 60661- 5670

2021 Tax Year Engagement Letter

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Dear Schuman Simon & Grodecki LTD Client:

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements.

We will prepare your 2021 federal and requested state income tax returns from information that you will furnish us. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. We will furnish you with questionnaires and/or worksheets to guide you in gathering the necessary information. Your use of such forms will assist in keeping the fee to a minimum.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, canceled checks and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them.

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations or other irregularities, should any exist. We will render such accounting and bookkeeping assistance as determined to be necessary for preparation of the income tax returns.

We will use professional 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. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.

The law provides various penalties that may be imposed when taxpayers understate their tax liability. If you would like information on the amount or the circumstances of these penalties, please contact us.

We are also available for tax planning services. Certain communications involving tax advice between you and our firm may be privileged and not subject to disclosure to the IRS. By disclosing the contents of those communications to anyone, or by turning over information about those communications to the government, you may be waiving this privilege. To protect your rights, please consult with us or your attorney prior to disclosing any information about our tax advice.

Your return may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights and appeals. In the event of such government tax examination, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred.

Our fee for these services will be based upon the amount of time required at standard billing rates plus out-of-pocket expenses. All invoices are due and payable upon presentation.

In accordance with our Firm's current document retention policy, we will retain copies of the records you have supplied us along with our workpapers for your engagement for a period of 7 years. All of your original records will be returned to you. After 7 years, the tax organizer, our work papers and any other files related to preparing your return will no longer be available. Physical deterioration or catastrophic events may shorten the time during which our records will be available. The working papers and files of our Firm are not a substitute for your original records.

If the foregoing fairly sets forth your understanding, please sign the enclosed copy of this letter in the space indicated and return it to our office. However, if there are other tax returns you expect us to prepare, such as gift and/or property, please inform us by noting so at the end of the return copy of this letter.

In order to provide you with excellent service and to allow us to prepare and deliver your tax return before the April 15th deadline, we ask that you provide us with all of your available tax information no later than March 25, 2022.

We want to express our appreciation for this opportunity to work with you. Please visit our website at www.ssgltd.com for additional information related to tax and accounting.

Sincerely,

Schuman Simon & Grodecki, Ltd.

I (we) have submitted this information for the sole purpose of preparing my (our) tax return(s). Each item can be substantiated by receipts, canceled checks, or other documents. This information is true, correct, and complete to the best of my (our) knowledge.

Taxpayer Name ________________________	Spouse Name ________________________
Signature ________________________	Signature (Not Required) ____________________
Date Signed: ________________________	Date Signed: ________________________
Phone: ________________________	Phone: ________________________
E-Mail: ________________________	E-Mail: ________________________

Tax Return / Source Documents /Tax Organizer Delivery Method Preferences

Please select preferences of client deliverables. Per SSG retention and IRS policy, we maintain electronic copies of all documents for a period of seven (7) years. Note that clients are responsible for mailing costs.

Select 1 Option for Each of the 3 Listed SSG Deliverables (SSG default is option 2 Mailed Paper or client preferences from prior year)	Tax Organizer	Tax Return	Source Documents
1. ELECTRONIC ONLY via Secure Encrypted Dropbox & HelloSign eSign Permission			
2. MAIL PAPER ONLY			
3. MAIL PAPER ONLY & HelloSign eSignature Permission for efficient e-filing			
4. HYBRID – Mail Paper & Electronic Delivery & HelloSign eSign Permission			
5. OPT OUT - File Tax Returns "Compliance with Gov(s)" but DO NOT want Client Copies			

Tax Liability/Refund Preferences Chose 1 Option – See Direct Deposit/Withdrawal Organizer Page

AUTOMATIC - Link Bank Account to Tax Return for Automatic Withdrawal Payments / Direct Deposit Refunds	
Client Responsible - Client will Mail Check(s) with Payment Vouchers to proper Governments	
Client Responsible ELECTRONIC - Client pays online IRS and/or state(s) website payments & estimates!	