



**SHARE THE HARVEST PARTNERS LLC**  
**Harvest Advisors LLC**  
**Harvest Pension Group, LLC**

4150 Belden Village St. NW, Suite 601, Canton OH 44718

330-493-1814 Fax: (330) 493-1807

[contact@sharetheharvest.com](mailto:contact@sharetheharvest.com)

[www.sharetheharvest.com](http://www.sharetheharvest.com)

**Instructions to Taxpayers:**

On behalf of all of us, thank you for allowing us to serve you in this annual responsibility.

Our goal is to make tax filing as simple as possible in spite of complex government rules. The IRS remains understaffed. The IRS predicts delays in processing and issuing refunds. Patience is key. Information Security is becoming increasingly important in all that we do.

Our Engagement Letter, Privacy Policy & Client Organizer follows. **You do not need to return a signed copy of this agreement.** Submission of the completed Organizer and your tax records are confirmation that you agree to the terms of the Engagement Agreement. If you do not agree with these terms, please contact our office before proceeding.

**Please forward the Organizer to us with your tax information.** If you can fill this in online & forward, wonderful! Using your own well-organized worksheets is fine. We ask that you send all information at one time through the **TaxDome** portal if able.

**If sending your tax information: Scan to PDF and upload to TaxDome will work best** for most and is most secure. However, we will accept paper copies of your records. **DO NOT SEND ORIGINALS.** A single PDF document (multiple pages per document) is preferred. It is not advisable to send personal information via e-mail. Drop-offs and documents brought to in-person appointment are fine. Email us for instructions. **DO NOT SEND PHOTOS or JPG files. We may request re-scanning if we cannot read the files efficiently.**

**Please forward your tax information by March 15 for priority processing.** Documents received later may require an extension. Those who owe additional taxes on April 15<sup>th</sup> face penalties and interest.

**We expect tax preparation fees to be paid in full before e-filing.**

If you have any questions, please call us or email us.

**Blessings!**

**Steven D Clifford,**  
**Enrolled Agent, Certified Financial Planner®**

## ENGAGEMENT LETTER & PRIVACY POLICY NOTICE

I/WE have engaged you to prepare my/our income tax returns, including federal, state, local and school districts as applicable for the year ended December 31, \_\_\_\_\_, except as marked.

In that respect, I/WE state that, to the best of my/our knowledge and belief:

- I/WE understand that it is my/our responsibility to provide all the information necessary to complete the returns. I/WE will retain for three years all the documents, receipts, cancelled checks and other records required to substantiate the items of income and expense claimed on my/our returns.
- I/WE understand that you will not audit or otherwise verify any information, and that you may require clarification or additional information.
- I/WE have provided true, correct, and complete information regarding my/our income as listed on the attached Forms W-2, 1099 and/or attached written summaries. I/WE have included all income received during the year, including unemployment compensation, sales of property, withdrawals from investments, jury duty pay, lottery winnings, etc.
- I/WE have provided true, correct, and complete information regarding amounts I/WE have provided to you to claim as tax deductions, and have maintained written documentation supporting all amounts, including logbooks and receipts. I/WE have fully documented all business travel and entertainment deductions and have maintained logbooks to support the business use percentage of automobiles, cellular phones, and other business assets.
- I/WE have no foreign financial accounts, trusts, or businesses, except as indicated in the information I/WE have provided to you.
- I/WE have not employed any household help that would be subject to payroll taxes except as reported.
- I/WE do not wish to designate a portion of my/our taxes to support the Presidential Election Campaign Fund or the Ohio Political Party Fund, or other optional donations, unless I/WE have specifically stated so in the attached documents.
- I/WE have provided you with an accurate total of out-of-state purchases made during the year(s) on which I/WE paid no sales tax, including purchases from catalogs, by telephone, and via the internet.
- I/WE will contact you as soon as practical if I/WE receive any letters from the IRS or other taxing authorities concerning these tax returns.
- I/WE understand penalties and interest may be imposed on late, underpaid, or incorrect returns.
- I/WE will contact you as soon as practical if I/WE discover additional information that will change my/our tax returns. I/WE understand additional charges may apply.
- I/WE understand if a question arises regarding the interpretation of tax law, and a conflict exists between the tax authorities' interpretation of the law and other supportable positions, you will use your professional judgment in resolving the issues. I/WE understand that you are not responsible for disallowed deductions, or the inclusion of additional unreported income or any resulting taxes, penalties or interest.
- I/WE understand fees will be due and payable upon completion of these returns, and that additional services will not be performed until the invoice for these services is paid in full.
- I/WE understand the invoice will be based upon your standard billing rates. A non-refundable deposit may be required.
- I/WE understand I/WE will be charged an additional fee to respond to any letters or requests from the IRS or other taxing authorities. I/WE understand that, in the event of preparer error, I/WE am/are responsible for any additional tax that may be due. Share the Harvest Partners LLC liability is limited to interest and penalties up to the date of discovery. Sometimes the IRS will abate penalties. We can assist but can offer no guarantees of success. Additional fees may be limited if the case is covered by Protection Plus. Conditions and limitations will apply.

## ENGAGEMENT LETTER & PRIVACY POLICY NOTICE

It is the policy of Share the Harvest Partners LLC to keep all information that we collect from you confidential. We restrict access to all nonpublic personal information about you to members of our firm who need to know that information to provide services to you. We maintain physical, electronic, and procedural safeguards to guard your nonpublic personal information. We collect nonpublic personal information about you from the following sources:

- Information we receive from you on tax preparation organizer, worksheets, Federal and State tax reporting forms, and from other documents we use in tax preparation or other financial and related services.
- Information about your transactions with us, our affiliates, and others.
- Information we may receive from outside agencies such as banks and brokerage houses.
- Share the Harvest Partners LLC uses your name and address, including releasing it to a printer or third-party mail house, for the purpose of facilitating Share the Harvest Partners (and affiliated businesses) mailings, such as communications and newsletters.

We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as instructed by you in writing or as required by law as listed below:

- Requirements to comply with federal, state, or local law.
- Requirements to comply with national, state, or local licensing rules.
- Requirements to disclose information in response to legal subpoenas.
- Items you permit or request us to disclose, as authorized by you in writing.

**By submitting the completed organizer, I/WE have read the above engagement letter and privacy policy and understand my/our responsibilities with regard to income tax preparation. If there are other tax returns that I/WE wish you to prepare, such as tax returns for my/our minor children, or other services, I/WE will forward the documents when available.**