

**March/April 2023**

**RE: LETTER OF ENGAGEMENT**

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Dear Sirs/Mesdames:

The purpose of this letter is to confirm that I have engaged Lohn Caulder LLP Chartered Professional Accountants to prepare my United States Federal and requested state(s) and local individual income tax returns for the 2022 tax year, along with the return(s) for my spouse and any other family members who require a tax return.

I confirm that it is my responsibility to provide Lohn Caulder LLP with a full and complete disclosure of all relevant information pertaining to my income tax affairs and I confirm that should additional information come to my attention which will affect the aforementioned individual income tax return(s), I will contact Lohn Caulder LLP immediately.

It is expressly understood that Lohn Caulder LLP will not audit, review or otherwise attempt to verify the accuracy or completeness of my tax return(s). I have final responsibility for the income tax returns and confirm that I will review them carefully before they are signed and filed.

I confirm that where it is determined that my individual income tax return(s) is incorrect as a consequence of incomplete or inaccurate information provided to Lohn Caulder LLP, I indemnify and save harmless, Lohn Caulder LLP for any amount of any taxes, penalties or interest that are assessed by the relevant taxing authority.

I can confirm that I will provide you with copies of all applicable tax forms including Forms W-2, 1098 and 1099, Schedules K-1, and other IRS (or foreign) forms which report items of income and deductions. If information has been summarized, I will provide receipts or cancelled checks if it will help clarify the information furnished, otherwise I will retain such records and they will be available to tax authorities upon request, in the event my tax return(s) is selected for further examination.

I confirm that if I am required to complete and file a Form 114 Report of Foreign Bank and Financial Accounts ("FBAR") for the 2022 tax year, I will provide Lohn Caulder LLP with all foreign account information necessary to complete and electronically file the FBAR by the filing due date. If I am unclear of the FBAR (or Form 8938) filing requirements, I will contact Lohn Caulder LLP to clarify if I am required to file the forms for the 2022 tax year.

I confirm that if I am unable to furnish all of my 2022 tax information to Lohn Caulder LLP by March 31, 2023, then I authorize Lohn Caulder LLP to request an extension of time to file my returns as it may not be possible to have them completed by the April 18, 2023 filing deadline.

Before you provide us with any personal information on behalf of others, you agree that you will have obtained consent for collecting, using and disclosing this information.

If this letter accurately reflects your understanding, please acknowledge your agreement by signing and returning to us the enclosed copy. Please feel free to call us with any questions or concerns at 604 687-5444.

Thank you for your trust in our business.

Yours Truly,

Print Name: \_\_\_\_\_

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

Email: \_\_\_\_\_

**Others for whom this authorization applies**

\_\_\_\_\_  
**Signature**

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The privacy of your personal information is assured. For further information on our privacy policy, please review under “about us” at [www.lohncaulder.com](http://www.lohncaulder.com)

You can also find our 2022 U.S. individual income tax checklist and FBAR worksheets at <http://www.lohncaulder.com/checklists/>