

RTI Tax & Accounting LLC  
12550 SE 93rd Ave, Ste 150  
Clackamas, OR 97015  
503-244-8767

## 2023 Tax Organizer - Individual

CLIENT NAME:  
ADDRESS:  
CITY, STATE, ZIP:

MOBILE:  
LAST 4 SSN:  
EMAIL:

Dear CLIENTS:

Thank you for the opportunity to prepare your 2023 individual tax return this year. We look forward to providing you with exceptional service.

The 2023 tax organizer will assist you in collecting and reporting information necessary for us to properly prepare your 2023 income tax return. Please complete the organizer sections and provide supporting documentation. It is not necessary to fill out all the data on the worksheets when you are providing the supporting tax documents, such as W2s, 1099s, etc. Prior year data, when available, is included on the organizer sections for your reference.

**Please provide us with the following additional information:**

- Copy of your 2022 tax return, if not prepared by this office
- Form(s) W-2 (wages, etc.)
- Form(s) 1099 (interest, dividends, retirement, etc.)
- Schedule(s) K-1 (income/loss from partnerships, S corporations, etc.)
- Form(s) 1098 (mortgage interest) and property tax statements
- Brokerage statements from stock, bond or other investment transactions
- Closing statements pertaining to real estate transactions, including home refinance statements
- Form(s) 1099-K (Merchant Card and Third-Party Network Payments) and cost of the items sold
- All other supporting documents
- Any tax notices received from the IRS or other taxing authorities
- Business clients: Profit & Loss statement for 2023 and Balance Sheet dated 12/31/2023

The filing deadline for tax returns is April 15, 2024. To meet this deadline, we require all tax documents be received by our office on or before March 4, 2024. Please note, due to IRS regulations, we must have written approval to file an extension for your tax returns, which can be an email. An extension does not extend your time to pay. Please reach out to ensure we can estimate an extension payment for you to reduce penalty and interest.

Please contact us if you need further assistance.

Best regards,

Raymond & Tara  
RTI TAX& ACCOUNTING LLC

**If we do not receive all of your tax documents by March 4th, do you authorize  
RTI Tax to file an extension for you?**

**YES or NO**

**PLEASE SELECT YOUR TYPE OF CLIENT RETURN COPY**

Printed \_\_\_\_\_

Secure Client Portal \_\_\_\_\_

## CLIENT ENGAGEMENT LETTER

RTI Tax & Accounting  
LLC 12550 SE 93rd Ave,  
Ste 150 Clackamas, OR  
97015 503-244-8767

CLIENT NAME:  
ADDRESS:  
CITY, STATE, ZIP:

MOBILE:  
LAST 4 SSN:  
EMAIL:

Dear CLIENTS:

Thank you for choosing RTI Tax & Accounting LLC to prepare your 2023 individual form 1040 personal income tax returns. We appreciate the opportunity to work with you. This letter specifies the terms of our engagement with you, clarifies the nature and extent of the services we provide, and confirms an understanding of our mutual responsibilities.

We will prepare your 2023 federal, state(s), and local(s) individual income tax returns. It is your responsibility to provide all the information required for the preparation of complete and accurate returns. We will assume the data you provide is correct and complete, as we will not audit or otherwise verify the data you submit, although we may ask you to clarify the information provided. We may provide you with a questionnaire and tax organizer to help you gather and organize the necessary information to complete an accurate return. You have the final responsibility for the tax returns and, therefore, you should review them carefully before you sign and file or authorize us to e-file them.

Taxpayers are required to maintain all the documents that form the basis of income, deductions, credits, and payments shown on the return. In addition, some items have specific substantiation requirements set forth by the IRS (e.g., business income and expenses, rental income and expenses, vehicle travel logs, medical expenses, charitable contributions over \$250, etc.). If you have any questions as to the type of records required, please ask us for advice. We are not responsible for the disallowance of doubtful deductions or inadequately supported documentation, nor for resulting taxes, penalties, and interest. We will rely, without further verification, upon information you provide to us from 3rd parties including, but not limited to, K1's, 1099's, 1098's, receipts, and similar items. Your signature on this letter confirms that we have advised you of the recordkeeping requirements.

We will use our judgment to resolve questions in your favor where the tax law is unclear or where there are conflicts between the taxing authorities' interpretation of the law and what seem to be other supportable positions. There may be situations where we are required by law to disclose a position on a tax return. We are not attorneys; therefore, we cannot provide you with a legal opinion on various tax positions. We can, however, advise you of the consequences of different positions. We will adopt whatever position you request on your returns so long as it is consistent with our professional standards and ethics. In the event, however, that you ask us to take an unsupported tax position or refuse to make any required disclosures, we reserve the right to withdraw from the engagement without completing or delivering the tax returns. Such withdrawal would complete our engagement and you agree to pay our fees based on time expended plus all out-of-pocket expenses through the date of withdrawal.

If your returns are selected for examination by a government agency, we will be available, upon request, to represent you and will render additional fees for the time and expenses incurred. Our fees for the services provided will be based on the complexity and time spent in preparing your return. Your invoice will be provided with your completed tax return and payment is due upon receipt.

Privacy laws established by the IRS prohibit us from providing your confidential information to anyone other than you without your specific, written authorization. In the interest of maintaining quality service and timeliness, we may use a secure 3rd party service to assist us in the use of technology to facilitate compliance with disclosure and storage of your tax information. We and the 3rd party provider have established written procedures and controls designed to protect client confidentiality and maintain data security. In recognition of the relative risks and benefits of this agreement to both the client and the firm, the client agrees, to the fullest extent permitted by law, to limit the liability of the firm to the client for any and all claims, losses, costs, and damages of any nature whatsoever, so that the total aggregate liability of the firm to the client shall not exceed the firm's total fee for services rendered under this agreement. The client and the firm intend and agree that this limitation applies to any and all liability or cause of action against the firm, however alleged or arising, unless otherwise prohibited by law. Both parties agree that there is a one-year limitation period to bring a claim against us for errors and omissions. The one-year period will begin upon the date of the tax professional's signature on the tax returns covered by this engagement letter.

Please be aware that U.S. individuals and entities with a financial interest in, or authority over, foreign financial accounts exceeding \$10,000 must report this to the U.S. Department of the Treasury. This includes indirect control over foreign accounts via domestic entities. Non-disclosure can lead to significant penalties. Required filings include Form 8938 with your tax return and FinCEN Form 114. Without information on your foreign accounts, our firm cannot prepare these forms, and any resulting penalties are not our responsibility. Without disclosure from you, we will assume no foreign assets or interests exist and won't file related forms without separate authorization

Notwithstanding anything contained herein, both the firm and client agree that regardless of where the client is domiciled and regardless of where this Agreement is physically signed, this Agreement shall have been deemed to have been entered into at the office of RTI Tax & Accounting LLC, located in Clackamas, OR, USA, and shall be the exclusive jurisdiction for resolving disputes related to this Agreement. This Agreement shall be interpreted and governed in accordance with the Laws of Oregon.

If we do not receive a signed engagement letter but receive from you a filled-out copy of the questionnaire, tax organizer, and/or supporting documentation to complete the tax returns, then such receipt by this office is deemed as evidence of your acceptance of all the terms set forth above.

We appreciate the opportunity to serve you. Please date and sign this letter to acknowledge your agreement with and acceptance of your responsibilities and the terms of this engagement. It is our policy to initiate services after we receive the executed engagement letter.

Best regards,

Raymond Leslie & Tara Walker  
RTI TAX & ACCOUNTING LLC

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Taxpayer's Signature & Date

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Spouse's Signature & Date

*If married filing joint, we need signatures from both taxpayer and spouse.*