REVIEW DRAFT | NOT EXECUTED | VERSION 2026-09-26-D1

Define The Tax-Client Engagement

Draft Status And Party

DRAFT - NOT FOR SIGNATURE. Version 2026-09-26-D1. Cima Tax Solutions is the customer-facing tax-service identity. Confirm its exact legal contracting entity, mailing address and responsible preparer before use. Do not assume the professional software seller is automatically the client's tax preparer.

1. Exact Work And Year

Identify the taxpayer/client, return types, tax years, jurisdictions, engagement fee and included work in the schedule. Bookkeeping, amended returns, prior-year cleanup, notices, audits, representation and planning are excluded unless expressly added. A website request alone does not establish an engagement.

2. Client Information And Review

The client supplies complete, accurate records and answers questions needed for preparation. Use the designated secure channel. Review the completed return and resolve questions before authorizing filing. The preparer must perform applicable professional and legal duties; this clause does not shift away duties that cannot lawfully be waived.

3. Filing Authorization And Timing

No return is submitted solely because an online payment or inquiry was received. Required filing authorizations must be obtained separately. Confirm document deadlines and filing responsibilities in the schedule. An extension may extend filing time without extending the time to pay; facts and applicable rules require review.

4. Fees And Optional Products

Disclose the preparation fee and any approved additional work before it is incurred. Refund advances, refund-transfer products and other financial products are separate and optional, with their own lender/provider disclosures. No refund amount, timing or loan approval is promised.

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Records, Boundaries And The Final Schedule

5. Privacy And Records

Protect tax information using the engagement's secure workflow and required safeguards. A website checkbox is not a substitute for any legally required consent to use or disclose tax-return information. Identify record-retention, return-copy delivery and access procedures in the final schedule. Do not use ordinary email or general contact forms for sensitive documents.

6. Questions, Corrections And Ending Work

State how the client should raise questions, report corrections or end the engagement. Clarify work already performed, any fee adjustment and how documents are returned or retained lawfully. No automatic post-preparation refund rule is inferred from the software enrollment policy; these are separate services.

7. Representation And No Guaranteed Result

Preparation does not automatically include representation before the IRS, a state agency or a court. Any such service requires an authorized professional, a separate scope and required authority. No outcome, deduction, credit or audit result is guaranteed.

Complete Before Signature

Legal provider / address: ____
Client(s) / contact / tax years / jurisdictions: ______________________
Return types / included work / exclusions: __________________________
Fee / additional-work approval / cancellation terms: _________________
Secure document channel / deadlines / records procedure: _____________
Responsible preparer / credentials / contact: _______________________
Client signature(s) / date: _______________________________________
Provider authorized signature / date: ______________________________

Separate Required Forms

Use the actual required e-file authorizations, taxpayer disclosure/use consents, bank-product disclosures and representation documents when applicable. This outline does not replace them and must be completed and reviewed for the actual engagement before signature.