



# JPT FINANCIAL SOLUTIONS, INC.

accounting control consultants & solutions specialists

419 River Road  
Bogota, New Jersey 07603

www.jptfs.com  
jptfs@jptfs.com  
Tel: 201-996-9854  
Fax: 201-996-0874

**NOTE: Signed Acknowledgement of the Gift Tax Return engagement contract below is required from all clients prior to the preparation of services**

**RE: Gift Tax Return Contract**

Dear Client:

Thank you for choosing JPT Financial Solutions to prepare your Gift Tax Return. 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 the understanding of our mutual responsibilities, we ask that you confirm the arrangements listed below. Acknowledgement of this information is required from all clients prior to the preparation of your gift tax return. Please sign and date as requested below and return this form to our office with your supporting tax documentation, and keep the attached client copy for your records.

Thank you in advance for your assistance. We are pleased to have this opportunity to serve you with your tax, accounting, advisory and solutions needs. Please contact our office if you have questions on the attached documentation.

Very truly yours,

JPT Financial Solutions Inc.

**Circular 230 Notice**

*IRS Regulations require us to advise you that, unless otherwise specifically noted, any federal tax advice in this communication (including any attachments, enclosures, or other accompanying materials) was not intended or written to be used, by any taxpayer for the purpose of avoiding tax-related penalties imposed under the Internal Revenue Code or any other applicable state or local tax law provision; furthermore, this communication was not intended or written to support the promoting, marketing or recommending of any of the transactions or matters it addresses.*



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**GIFT TAX RETURN ENGAGEMENT CONTRACT**

**PLEASE SIGN, DATE AND RETURN TO OUR OFFICE**

- 1.) You agree to engage JPT Financial Solutions Inc. to provide you with gift tax preparation services, along with the preparation of any other tax returns and amendments, as well as any accounting, advisory and/or solutions services as needed.
  - 2.) We will prepare your gift tax return solely on information that you provide to 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.
  - 3.) You represent that the information you are supplying to us is accurate and complete to the best of your knowledge and that you have disclosed to us all relevant facts affecting the returns. The accuracy of the information and completeness of the representations reflected in your return is your responsibility. You confirm that all items included in your return are correct and complete, and that all gifts have been disclosed and information claimed is supported by receipts.
  - 4.) You have the final responsibility for the gift tax return and, therefore, you should review them carefully before you sign them.
  - 5.) Although we may rely in good faith on the information that you provide to us, as tax practitioners we are not permitted by the IRS to ignore the implications of the information furnished to us or actually known by us. Although our work in connection with the preparation of your gift tax returns does not directly include any procedures designed to discover defalcations or other irregularities, we are required by the IRS to make reasonable inquiries if the information that is provided to us appears to be incorrect, inconsistent with an important fact or another factual assumption, or incomplete. Additional disclosures may be required from the client to substantiate any tax data presented if deemed necessary.
  - 6.) We will render any required accounting and bookkeeping assistance as determined to be necessary for preparation of the gift tax returns. These additional services will be included in our final tax preparation invoice.
  - 7.) Our fees are payable by you immediately after completion and approval by you of the tax return. For all gift tax returns, you understand that in order for JPT Financial Solutions to satisfy IRS requirements to sign-off on your return as a "paid preparer", **it is required that clients remit payment to JPT Financial Solutions at the completion of your gift tax return preparation.**
  - 8.) Our fees for services are calculated in proportion to the amount of work necessary to complete your return. This includes time spent assembling and reconciling documentation supplied by the client, as well as follow-up discussions with the client (verbal and/or written e-mails) for supplemental data or clarification of information received from the client.
  - 9.) Should your returns be selected for examination, or other inquiry is made of your returns by the Internal Revenue Service or any other tax authority, we will be pleased to represent you before these authorities and prepare any refund claims or protests that may be necessary to obtain a final determination of your income tax liability. You will receive additional invoices for these services.
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**Gift Tax Return Engagement Contract**

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**Acknowledgement By Client**

CLIENT TAXPAYER

SPOUSE (IF JOINT RETURN)

Accepted by (Please Print) \_\_\_\_\_

Signature of Client \_\_\_\_\_

Date \_\_\_\_\_

Gift\_tax\_rep\_let\_2011.doc

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- 3.) You represent that the information you are supplying to us is accurate and complete to the best of your knowledge and that you have disclosed to us all relevant facts affecting the returns. The accuracy of the information and completeness of the representations reflected in your return is your responsibility. You confirm that all items included in your return are correct and complete, and that all gifts have been disclosed and information claimed is supported by receipts.
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