



# MER Tax, Accounting, and Consulting

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## 2017 Forms W-2 and W-3 Engagement Letter

### Forms W-2 and W-3

The due date for filing 2017 Forms W-2 and W-3 with the SSA is January 31, 2018, whether you file using paper forms or electronically. This means that when we provide you with your Forms W-2, we must have any corrections to names, SSNs, and addresses to us ASAP.

**Because the penalties are so severe, we want to be very clear on the services we are providing and what is expected from you.**

1. This letter confirms the services you have asked our firm to perform and the terms under which we have agreed to do that work. Please read this letter carefully because it is important to both our firm and you that you understand what you can and cannot expect from our work. If you are confused at all by this letter or believe we have misunderstood what you need, please call us before you sign it.

2. This engagement letter represents the entire agreement regarding the services described herein and supersedes all prior negotiations, proposals, representations or agreements, written or oral, regarding these services. It shall be binding on the heirs, successors, and assigns of you and us. The Internal Revenue Service imposes penalties on taxpayers, and on us as return preparers, for failure to observe due care in reporting for income tax returns. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom we prepare tax returns to confirm the following arrangements.

**3. We will prepare the returns from information which you will furnish to us. It is your responsibility to provide all the information required for the preparation of complete and accurate returns.** We will not audit, review, compile, or otherwise verify the data you submit although we may ask you to clarify some of the information. **If you are aware of any changes of addresses for your present and former employees, please provide them to us immediately.**

4. Our fee to prepare and electronically file the Forms W-2 and W-3 will be \$8.00 per Form.

5. It is our policy to keep records related to this engagement for three years, after which they are destroyed. **However, we do not keep any original client records, so we will return those to you at the completion of the services rendered under this engagement. When records are returned to you, it is your responsibility to retain and protect your records for three years for possible future use, including potential examination by any government or regulatory agencies.**

6. We appreciate the opportunity to serve you. Please sign and date 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 signed engagement letter. If any provision of this agreement is declared invalid or unenforceable, no other provision of this agreement is affected and all other provisions remain in full force and effect.

Sincerely,  
**MER Tax, Accounting, and Consulting**

\_\_\_\_\_  
(Your Business Name)

\_\_\_\_\_ Date \_\_\_\_\_  
(Your Signature)

I have read the above terms of the engagement letter and agree with the terms of this engagement.