



CARAS & SHULMAN, PC
Certified Public Accountants
Business Advisors

Date: _____

Dear _____:
Client Name

SUBJECT: Engagement Letter 2018 Forms 1099 and Transmittal Form 1096

This letter is to confirm our understanding of the terms and objectives of our engagement and the nature and limitations of the services we will provide. We will perform the following services:

We will prepare, from information you provide, Federal and State (if applicable) Forms 1099 and Transmittal Form 1096 for the tax year 2018. We will not audit or review any information you provide to us in the preparation of these forms. You are solely responsible for the information reported on the 1099 and 1096 Forms. It is also your responsibility to mail the forms to the recipients, by the respective due date.

You are aware that it is your responsibility to determine the recipients of your 1099's from your company's books and records, to gather the recipient's correct information required to issue the 1099's, to retain proper receipts and other documents in your office to be in compliance with 1099 filing and for timely filing of your 1099's. We have no responsibility for any penalty that may arise from our client(s) failure to provide 1099 information to our office, for late filing or failure to file, or for incorrect information reported on these forms.

Failure to file may occur if you do not file the forms by January 31, 2019. The penalty per form is \$50 if you file within 30 days of the due date. If you file more than 30 days late but before August 1st, the penalty is \$100 per form. The penalty increases to \$260 for any form filed after August 1st or if not filed at all.

By signing below and submitting your information you acknowledge you are engaging Caras & Shulman, PC to prepare 1099 Series Forms. You understand that you are primarily responsible for the correctness and completeness of your information reports. You represent to Caras & Shulman, PC that all information which you furnished to us is true, complete and accurate. In addition, you have and will retain all necessary written support and documentation for that information. Further, it will be your responsibility for delivery to the recipient by the deadline.

If the foregoing is in accordance with your understanding, please sign this letter in the space provided and return it to our office. We will not prepare any 1099 or 1096 forms without a signed engagement letter.

Sincerely,
Caras & Shulman, P.C.
Caras & Shulman, PC

Acknowledged and Accepted for _____:

Printed Name

Date

Signature

Form 1099 Preparation Request for _____ for the Year Ended December 31, 2018.
 Provide complete information below for each 1099 recipient. **We are unable to accept responses indicating "same as last year."**

RECIPIENT'S INFORMATION					
Recipient's Name	Recipient's Federal ID (SSN or EIN)	Address			Amount Paid
		Address:		Suite or Apt No:	\$
		City:	State:	Zip:	
		Address:		Suite or Apt No:	\$
		City:	State:	Zip:	
		Address:		Suite or Apt No:	\$
		City:	State:	Zip:	
		Address:		Suite or Apt No:	\$
		City:	State:	Zip:	
		Address:		Suite or Apt No:	\$
		City:	State:	Zip:	
		Address:		Suite or Apt No:	\$
		City:	State:	Zip:	

Our fee for these services is \$25 per 1099 and \$100 for each 1096 transmittal.
A late processing fee of \$100 will be charged for information received after January 12, 2019.