

Thank you for using Tucson Tax Team for your tax preparation needs. Clear communication is a key to a successful business relationship. The purpose of this letter is to make sure we both have the same understanding of the services we provide.

Tax Return Preparation

We will prepare your 2017 Federal and State tax returns based on information you provide. Services for preparation of your return do not include auditing or verification of information provided by you.

- Tax Preparation fees are based on the forms and schedules needed to complete your return. Additional charges may include compilation of information, research of asset basis, NOL's, 1099's, FIN CEN, and other domestic and foreign reporting forms.
- Preparation fees cover limited assistance and consultation during the year; they do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
- Information you provide will be kept confidential. However, our discussions are not protected by any form of attorney-client privilege. In addition, if you file a joint return there is not privacy for or from your spouse in regard to our tax services. We cannot disregard the implications of any information you provide in the process of preparing your return.
- We do not guarantee that the IRS will timely accept your tax return if filed within 5 days of filing deadline.
- We reserve the right to file extensions if all information has not been received by April 1st.
- Occasionally we make mistakes. Please let us know if you receive any letters from the government. We do correct returns at no cost and pay any penalties if we are at fault, provided we are notified immediately of our error. However, we are not responsible for paying any additional taxes owed.

Taxpayer's Responsibilities

- You agree to provide us all income and deductible expense information. You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable. We recommend you keep proof of personal deductions a minimum of four years and proof of business/rental deductions for a minimum of seven years.
- Please review the return carefully before signing to make sure the information is correct.
- Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required for preparation of late returns.

Questions

Yes

No

I/we have foreign income or assets including foreign gifts or retirement accounts

I/we purchased, sold or traded real estate, virtual currency or other assets including a foreclosure/repossession.

I/we had ACA compliant health insurance for all 12 months for myself, my spouse, and all my dependents.

I/we made estimated tax payments.

I/we gave a gift in cash or property or made or forgave a loan in excess of \$14,000 per individual during the year.

I/we are legally blind or disabled.

Would you like us to have an emergency contact? _____

Direct Deposit/Debit Info

Routing # _____ Account # _____

Please initial below:

____ I certify that the above numbers are correct and accurate for my bank accounts.

____ I would like all refunds deposited into the above account.

____ If I owe taxes I want them paid electronically from the above account.

Date to be deducted _____

Please list any life changes or issues you would like to discuss with us.

Signatures By signing below, you acknowledge that you understand and accept your obligations and responsibilities and that you understand Tucson Tax Team's responsibilities in preparing your tax return as explained above.

Client Signature

Date

Client Signature

Date

Last Name

Last Name

For office use only

Received additional info for: Sch C Sch E Foreign Income Gift/Loans
 S-Corp Partnership Estate/Trust Virtual Currency