

To ensure our records are up-to-date, you must complete all applicable fields.

Your Name \_\_\_\_\_ Date \_\_\_\_\_

- Best phone number to reach you: \_\_\_\_\_
- Best email address for questions: \_\_\_\_\_
- Address if different from last year: \_\_\_\_\_
- If you are receiving a refund do you want Direct Deposit?  Yes  No Use Same Account  Yes  No  
 Account Change: Bank Name \_\_\_\_\_  Checking or  Savings  
 Account Number \_\_\_\_\_ Routing Number \_\_\_\_\_ Joint Account  Yes  No
- Select method of receiving copy of your return:  Electronic copy OR  Paper copy  
 The Electronic copy will be sent to the email address noted above once the tax return is paid for.
- Do you have a Foreign Bank Account  Yes  No
- Did you receive 1 or more stimulus checks?  Yes  No If yes, how much in 2020 \$ \_\_\_\_\_  
 how much in 2021 \$ \_\_\_\_\_
- Did you receive unemployment income in 2020?  Yes  No If yes, we will need a copy of 1099-G
- At any time during 2019, did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?  Yes  No

**Any Dependent Changes**

Add Name: \_\_\_\_\_ DOB \_\_\_\_\_ SSN \_\_\_\_\_

Add Name: \_\_\_\_\_ DOB \_\_\_\_\_ SSN \_\_\_\_\_

Remove Name: \_\_\_\_\_

**Homeowners:** If you answer yes to any of the following questions, we will need a copy of financing statement

- Did you purchase a home last year?  Yes  No
- Did you sell a home last year?  Yes  No
- Did you refinance your home last year?  Yes  No

**If you are a Business Owner?**

Were you issued a 1099 for your business?  Yes  No  
 What type of business is it? \_\_\_\_\_

\*Make sure you provide a categorized breakdown of any business expenses ex. Office supplies, telephone

**Please Sign and Include Engagement Letter**

## ENGAGEMENT LETTER FOR TAX YEAR 2020

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 an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements:

You understand that it is your responsibility to provide us with all the information required to complete your tax return. In that regard, you state that to the best of your knowledge and belief:

You have provided true, correct and complete information regarding your income as listed on the attached Forms W-2, 1099 and/or attached written summaries. You understand that it is your responsibility to provide all the information necessary to complete the returns. We will retain for 4 years all the documents and other records required to substantiate the items of income and expense claimed on your return.

You have provided true, correct and complete information regarding amounts to claim as tax deductions, and have maintained written documentation supporting all amounts, including logbooks and receipts. You understand that if a question arises regarding the interpretation of tax law, and a conflict exists between the tax authorities' interpretation of the law, and other supportable positions, that we will use our professional judgment in resolving the issues.

You understand that taxing authorities may examine the returns, and that documentation should be retained to support the information provided by you, especially business travel and entertainment deductions, business use % of autos and other assets, and barter activities, and that penalties may be imposed on returns that are late, underpaid or incorrect.

You understand that we will not audit or otherwise verify any information, that we may require clarification or additional information, that we are not responsible for disallowed deductions, or the inclusion of additional unreported income or any resulting taxes, penalties or interest.

***You understand that you will be charged an additional fee if we are asked to assist or represent you in a tax examination OR INQUIRY.*** You understand that, in the event of preparer error, you are responsible for additional tax that may be due, but that the extent of our responsibility is to pay for any penalty that the IRS or the above state revenue department may assess.

You understand that our services are not intended to determine whether you have filing requirements in other taxing jurisdictions that you have not informed us of.

You will contact us immediately if you discover additional information that will lead to a change in your return, or if you receive any letters from the IRS or state taxing authorities.

You understand that our bill will be due and payable upon completion of these returns, and that additional services will not be performed until the bill for these services is paid in full.

You understand that we will not file any federal, state or local tax extensions without your specific written request to do so.

**RECORD RETENTION:** In accordance with our firm's current document retention policy we will retain our work papers and your tax returns for your engagement for *four years*. We will provide you a copy of the depreciation schedules and tax returns and other pertinent work papers that should be a part of your books and records. If you should need replacements, we will provide additional copies at our standard copying fees. All of your original records will be returned to you. After four years, our work papers and files will no longer be available. Physical deterioration or catastrophic events may shorten the term during which our records will be available. The working papers and files of our firm are not a substitute for the original records of your company. It is agreed and understood that in connection with the performance of this engagement by Integrity Tax and Small Business Solutions, Inc. that the work papers prepared by us shall remain the property of Integrity Tax and Small Business Solutions.

We appreciate the opportunity to serve you, and look forward to a continuing, a mutually satisfying relationship.

Very truly yours, Integrity Tax and Small Business Solutions

The terms described in this letter are acceptable and are hereby agreed to and shall remain in effect until terminated by either party in writing.

Taxpayer/Spouse Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Print Name: \_\_\_\_\_