

2023/TY2022 "Returning" Client Information

Kathy's Tax Service LLC

Will prepare your federal and state income tax returns based on the information you give to us. It is your responsibility to provide all the information necessary to complete your tax returns at the **beginning** of preparation. You will keep all necessary supporting documentation should it be needed for an audit examination later either by the IRS or state. You acknowledge that should you receive any letters from the IRS or State requesting more information that your Tax Prep fees do not cover this and you may be required to pay a separate fee starting at \$125 per hour. Should you choose "Fee Collect" and your income tax refund is kept by the Internal Revenue Service (IRS) to be applied to a prior debt, you agree to pay the original preparation fee to settle your account.

If data is entered into our tax preparation software and you elect to go elsewhere to file your taxes a **Minimum \$150 Consultation Fee** applies.

Taxpayer

Social Security Number

Name _____

Address if different:_____

City/ State/ Zip Code

Date of Birth _____

Spouse

Social Security Number

Name _____ Address_

City/ State/ Zip Code

Date of Birth _____

Cell Phone# _____

Cell Phone# _____

E-mail Address: _____

E-mail Address: _____

Did you or your spouse have "Marketplace" Health Insurance? _____ yes or _____ no IF YES, have you included your Marketplace Insurance Form 1095-A? _____

Dependent Information: Same as last year - NEW this year OR (Please circle one) Any changes, additions or deletions, please complete a dependent worksheet if you have ANY dependents unless you circled "Same as Last Year".

You represent to us that the information supplied is true, complete, and correct.

I agree to receiving automated phone calls and/or text messages at the phone numbers supplied above about my tax returns and future reminders/offers (Not a condition for service).

(Both spouses must sign for the preparation of joint returns)

Taxpayer Signature _____

Date _____

Spouse Signature _____

Date _____

Kathy's Tax Service LLC

2022 Tax Year

General Engagement Letter for Individual Tax Return Preparation

This letter is to inform you, the taxpayer, of the services we will provide you, and the responsibilities you have for preparation of your tax return.

Tax Return Preparation:

- We will prepare your 2022 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.
- This engagement does not include any audit or examination of your books or records. In the event your returns are audited, you will be responsible for verifying all items reported. You acknowledge and understand it is your responsibility to be able to verify and prove all items on the return(s), including the following: any itemized deductions, relationship and support of any dependents, stocks & mutual fund transactions, capital asset purchase and/or sale, rental property, sole proprietorship and/or farm income and expenses, where applicable.
- You must review the return carefully before signing to make sure your information is correct.
- The tax return preparation fee does not include bookkeeping.
- Preparation fees must be paid before your tax returns are delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay an hourly fee for the work completed. A retainer is required for preparation of late returns.
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
- Preparation fees do cover *limited assistance and consultation* during the year.
- The engagement to prepare your 2022 tax returns ends upon delivery of your completed returns and original documents to you. Please store your supporting documents and copies of your tax returns in a secure place for at least seven (7) years.

Taxpayer Responsibilities:

- You agree to provide us with all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are correct and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to supply written records of all items included on your return if audited by either the IRS or any state tax authority. We can provide guidance concerning what evidence is acceptable.

SIGNATURE(S): By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities and that you understand our responsibilities in preparing your tax returns as explained above. For a joint return, both taxpayers must sign.

Signature(s): _____

Taxpayer

Spouse

Date Signed: _____

Privacy Policy: The nature of our work requires us to collect certain nonpublic personal information about you and your family, if applicable, from various sources. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our company has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services requested by you. We will not disclose your personal information to any third party without your express permission, except where required by law. We keep physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.

We know that you have confidence in our ability to perform the services requested by you. Equally important to us is your confidence in knowing that all your personal information is safe.

Please contact us at (251) 843 5153 with any questions or concerns about our privacy policy.