



4230 LBJ FREEWAY SUITE #101

DALLAS, TX 75244

OFFICE: 469-974-4774

FAX: 972-925-0115

Date:

First Name:

Spouse Name:

Birthdate:

Spouse Birthdate:

Social Security #:

Spouse SSN #:

Phone Number:

Spouse Phone Number:

Email:

Spouse Email:

Occupation:

Spouse Occupation:

Street Address: City: State: ZIP:

Home Phone: Marital Status: Country From:

Childrens / Dependans

Name	Social Security Number	Birthdate
1.		
2.		
3.		
4.		

General Questions:

1. Do you have Health Insurance Information? Y/N Please provide 1095's or supporting documents
2. Did you buy/sell a House 2017? Y / N If yes, when..... (HUD Settlement Statement required)
3. Did you move in 2017? Y / N If yes, was the move work related? Y / N
4. Did you have childcare expensase? Y / N If yes, please provide supporting documentation.
5. Did you and/or spouse attend school? Y / N If yes, please provide supporting documentation.
6. Did you make any retirement contributions? Y / N If yes, please provide supporting documentation.
7. Did you receive additional income not reported to the IRS? Y / N If yes, how much?.....
- 8 Mortgage interest or Private Mortgage Insurance (PMI) Y / N If yes, please provide 1098 forms or supporting documentation
- 9 Real Estate Taxes paid (if not escrowed): &..... Other Prop Taxes (Auto): \$.....
- 10 2017 Taxes Preparation Fees Paid \$
- 11 Case charitable donations: \$..... Noncase charitable Contribution: \$

Signature.....

Spouse Signature.....



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INCOME TAX RETURNS ENGAGEMENT LETTER

Dear Client:

Thank you for the privilage of allowing me to provide you with year-round tax services. I am committed to providing you with the highest quality of tax preparation and excellent service. The engagement latter will express the terms and conditions under which i will provide you with the tax services and responsiblites for each of us.

I will prepare your federal income tax return (and any state return you may require) from information you provided under the assumption that all information you submit as true, accurate and complete according to your documentations. In preparing your return(s), i will not audit or verify data you submit (although i may ask for certification). I will use my judgemnt in resolving question where the tax law is unclear or where there may be different enterpretations of the law. I will resolve such question in your favor whenever possible.

I will furnish a questionnaire to help you gather the necessary information. You will provide me with all information required to prepare your return(s) representing that the information is accurate and complete to the best of your knowledge. You have the final responsibility for the income tax return and, therefor, you should review carefully before you sign. Mailling your tax return if not electronically field is your responsibility I will provide pre-addressed envelopes, but no postage will be included.

Frees for individual income tax return will be computed according to our current fee schedule, plus any out of pocket expenses. **Full payment of your tax preparation fee is required electronically filling your return or releasing the paper to you.** We reserve the right to ask for retainer fees to be paid in advance of any work completed from new clients and any past client we have exprienced payment problems. Rates are subject to change. A free copy of your tax return will be provided to you for your records, there will be a \$25.00 charge for any additional copies

All returns are subject to be reviewed by the IRS. If by chance you recieve notification that your return is selected for audit review, please reach out to me. Most audit are normal behavior so please don't panic. I will advice on how to move forward.

Privecy Statement: It is required by law to maintain a copy of returns that we have prepared or electronically field. We will not sare your information with any other parties other than those required by law without your permission.

I would like to express my appreciation for this apportunity to work with you.

Tax Payer Signature:

Date:

Spouse Signature:

Date:

Tax Preparer Signature:

Date: