

2019 TAX ORGANIZER

PRICEDEAN

Dear Client,

Thank you for choosing our firm to prepare your income tax returns for tax year 2019 and thereafter. This letter confirms the services we will provide.

We will prepare your federal and state returns based on information you provide. Although our work will not include procedures to discover irregularities or inaccuracies in the tax data you provide, we may ask for clarification of certain information, or additional information, so that we can prepare accurate and complete returns for you.

It is your responsibility to provide all necessary information related to income and deductions, and to respond to our inquiries in a timely manner so that we are able to accurately complete your returns by the appropriate due dates.

You are responsible for maintaining appropriate records, such as official tax documents you receive, receipts and substantiation for your deductions, and purchase and sales information for assets.

It is your responsibility to review your returns before they are filed to determine that all income has been correctly reported and that you have substantiation for your deductions. Filing your returns by the due dates is your responsibility.

If your returns are later selected for review or audit by taxing authorities, we will be glad to assist or represent you if you desire. Our fees for preparing your returns do not include time that might be necessary to assist you during a taxing authority review.

Our fees for preparation of your returns are based upon our standard billing rates plus out-of-pocket expenses. Our invoices are due and payable upon presentation. We reserve the right to use any banking information you provide to us to debit your bank account(s) in the event you have not paid our fees 30 days after your taxes have been filed.

If this letter accurately summarizes your understanding of our agreement relating to the preparation of your tax returns and you have read and understood the Disclosure Statement, please sign below and return it to us.

Thank you again for choosing our firm to prepare your tax return. We appreciate your business.

Client Name

Date

Client Signature

Client Spouse Name

Date

Client Spouse Signature

As tax practitioners, we receive and collect nonpublic personal information from various forms and statements that you provide. We do not disclose such information unless you instruct us to do so. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your nonpublic personal information.

TO BEST SERVE YOU AND MINIMIZE ERRORS, PLEASE TYPE IN ALL DATA USING A PDF READER.
VISIT www.adobe.com or www.foxitsoftware.com TO DOWNLOAD PDF READER.

DISCLOSURE STATEMENT

The Internal Revenue Service and state tax agencies match information they receive with amounts reported on your tax return(s). A negligence penalty may be assessed when income is underreported or when deductions are overstated.

Therefore, all tax documents you received, should receive, or may not have received will or may be reported to the federal and state tax agencies as required by law.

Not receiving these tax documents does not exempt you from reporting those items on your tax return, if required. Failure to report all taxable income may result in penalties and interest, even if you didn't receive a tax document from the payer.

You are expected to keep record of all payments received and all deductions claimed. Lack of documentation to support deductions claimed may result in substantial penalties and interest.

The following forms are typically received or prepared by or for taxpayers. Please provide us a copy of the documents you received.

Financial Statements (Income Statement, Balance Sheet, etc) - Business Clients Only
W-2 (Wages)
1095-A (Health Insurance Marketplace Stmt)
1099-R (Retirement)
1099-INT(Interest)
1099-DIV (Dividends)
1099-B (Brokerage Sales)
1099-MISC (Rents, etc)
1099 (ALL Form types not listed)
1098-T (Education)
1098 – Mortgage Interest
Sales/Purchases
Schedules K-1 : Forms 1065, 1120S, 1041
Annual Brokerage Statements
Form HUD-1 for Real Estate
8886, Reportable transactions
Other Tax Information Statements and Documents

Our request for additional supporting documentation is primarily based on IRS Circular 230 that requires tax practitioners to obtain reasonable and sufficient information when preparing tax returns.

If an extension of time is required, any tax due must be paid with that extension. An extension of time is NOT an extension to pay taxes due. Any taxes not paid by the original filing deadline may be subject to late payment penalties and interest.

The purpose of this disclosure is to inform you of the impact of reporting information on your tax return. It is not intended to serve or provide you with the entire tax laws of federal and state tax agencies.

Please keep copies of all your records for at least 7 years. Electronic or paper form is acceptable. We recommend electronic form as the most efficient method to retrieve data, as well as preserve data integrity.

PLEASE USE A PDF READER TO TYPE IN ALL DATA. DO NOT HANDWRITE DATA.
VISIT www.adobe.com or www.foxitsoftware.com TO DOWNLOAD PDF READER.

| | | | |
|-----------------------------------|--|------------------------------------|--|
| Business Name | | | |
| Business Trade or DBA Name | | | |
| Tax ID Number (EIN) | | Tax Form Type: | |
| Organization Date | | S-Corp Date (if applicable) | |
| Contact Name | | | |
| Contact Phone | | | |
| Contact Email | | | |
| Alternate Contact Name | | | |
| Alternate Contact Phone | | | |
| Alternate Contact Email | | | |

Business Address _____ **Apt/Suite** _____

City _____ **State** _____ **ZIP** _____

| Owner# 1 | | |
|--------------------------------|------------------------------|----------------------------|
| Full Name _____ | | |
| SSN/TIN _____ | | |
| Address _____ | | |
| City _____ | | |
| State _____ | ZIP _____ | |
| Capital % <input type="text"/> | Profit% <input type="text"/> | Loss% <input type="text"/> |
| Active <input type="text"/> | Passive <input type="text"/> | |

| Owner# 2 | | |
|--------------------------------|------------------------------|----------------------------|
| Full Name _____ | | |
| SSN/TIN _____ | | |
| Address _____ | | |
| City _____ | | |
| State _____ | ZIP _____ | |
| Capital % <input type="text"/> | Profit% <input type="text"/> | Loss% <input type="text"/> |
| Active <input type="text"/> | Passive <input type="text"/> | |

| Owner# 3 | | |
|--------------------------------|------------------------------|----------------------------|
| Full Name _____ | | |
| SSN/TIN _____ | | |
| Address _____ | | |
| City _____ | | |
| State _____ | ZIP _____ | |
| Capital % <input type="text"/> | Profit% <input type="text"/> | Loss% <input type="text"/> |
| Active <input type="text"/> | Passive <input type="text"/> | |

| Owner# 4 | | |
|--------------------------------|------------------------------|----------------------------|
| Full Name _____ | | |
| SSN/TIN _____ | | |
| Address _____ | | |
| City _____ | | |
| State _____ | ZIP _____ | |
| Capital % <input type="text"/> | Profit% <input type="text"/> | Loss% <input type="text"/> |
| Active <input type="text"/> | Passive <input type="text"/> | |

Owner# _____

Full Name _____

SSN/TIN _____

Address _____

City _____

State _____ ZIP _____

Capital % Profit% Loss%

Active Passive

Owner# _____

Full Name _____

SSN/TIN _____

Address _____

City _____

State _____ ZIP _____

Capital % Profit% Loss%

Active Passive

Owner# _____

Full Name _____

SSN/TIN _____

Address _____

City _____

State _____ ZIP _____

Capital % Profit% Loss%

Active Passive

Owner# _____

Full Name _____

SSN/TIN _____

Address _____

City _____

State _____ ZIP _____

Capital % Profit% Loss%

Active Passive

Owner# _____

Full Name _____

SSN/TIN _____

Address _____

City _____

State _____ ZIP _____

Capital % Profit% Loss%

Active Passive

Owner# _____

Full Name _____

SSN/TIN _____

Address _____

City _____

State _____ ZIP _____

Capital % Profit% Loss%

Active Passive

DUPLICATE THIS PAGE FOR ADDITIONAL OWNERS

