



Thank you for choosing Anchor Accounting & Tax, Inc. to assist you with preparation of your tax return. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

### **1. Complete Information Required**

We will prepare your federal and state income taxes and will depend on you to provide the information we need to prepare complete and accurate returns.

- Complete the Tax Organizer form(s) provided.
- Provide copies of all W2s, 1099s, 1098s, 1095s, etc
- New clients: Provide also provide a copy of your prior year's tax return

### **2. Secure Portal**

Your privacy and protection of your identity and financial information is important to us. For this reason, we process all messaging, tax info, documents, tax returns, and e-signatures, and payment of our fees through our secure client portal.

Email is not secure. Do not email with tax information or documents. Instead, correspond with us securely via the "Compose Message" feature at the portal. Send documents via the portal's "Upload Documents" feature.

Access the portal at: [https://login.atomanager.com/atom\\_anc/WebInfo.aspx](https://login.atomanager.com/atom_anc/WebInfo.aspx). To log in, enter (a.) the primary taxpayers social security number -or- if business entity, the EIN number and (b.) your password. If you need/forget your password, leave the password block empty, and click the "need password" link. One will be emailed to the primary taxpayer's email on file.

### **3. Bookkeeping not included**

Bookkeeping services are not included in our standard tax preparation fees. To avoid additional fees, please total up your receipts and provide total dollar amounts in the appropriate spaces on the Business Worksheet. By "Bookkeeping services" we mean the following activities performed by us, such as:

- Adding up/categorizing income and expenses from bank statements, receipts, invoices, hand-written paperwork, etc.
- Reviewing and adjusting client prepared QuickBooks files or spreadsheets
- Working with data, records, and information presented in any format other than provided in the Questionnaire, Business Organizer, Rental Property or other Worksheets

If requested, we will perform bookkeeping services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will, of course, inform you of any material errors, fraud, or other illegal acts we discover.

#### **4. IRS Penalties**

The law imposes penalties when taxpayers underestimate their tax liability, file late, pay late, and/or fail to make quarterly estimated tax payments. In addition, filing an "Automatic Extension of Time to File" with the IRS only grants an extended time to file; it does not extend your time to pay the taxes due. Please call us if you have concerns about such penalties.

#### **5. Tax Laws**

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

#### **6. Fees**

Our fee will be based on the time required at standard billing rates plus out-of-pocket expenses. Payment of an initial retainer is required to begin preparation of your return. The balance of our fee is due and payable once the return preparation is complete. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (30) days of completion of our preparation services. We will not file the return until all prep fees have been paid. A 3% convenience fee is charged for on line, electronic, and credit/debit card payments. This fee can be avoided with payments by cash, check or money order. Note: We will not take part of your refund as payment, nor do we offer refund anticipation loans.

#### **7. Filing Your Return**

Once the return preparation is complete, we will provide a "REVIEW Copy" of your return via our secure portal, along with authorization-to-file documents for either your wet signature or digital signature ("E-SIGN"). Review your Review Copy carefully before signing the authorization-to-file documents.

We will file the return electronically upon receiving your "E-SIGN" or digital authorization. If you do not elect to have us e-file your return, then you will be solely responsible to paper file (mail) the return with the appropriate taxing authorities. Our engagement to prepare your tax return will conclude with the delivery of the completed return to you (if paper-filing) or your signature and our subsequent submittal of your tax return (if e-filing).

### 8. Client Records

If you provide original "hard copy" records for preparation of your return, we will make them available to you for pickup at the end of the engagement. We can mail them to you, if requested, subject to a mailing and handling fee. You should securely store these records, along with all supporting documents, canceled checks, etc., as these items may later be needed to prove accuracy and completeness of a return. Note: All paperwork, receipts, statements and client records left here will be securely shredded if not picked up by year-end.

### 9. Consent to Disclosure

Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than those related to the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

By completing the form, you authorize us to comply with your future requests to forward tax information to mortgage companies, banks, lending institutions, insurance companies, and so on.

In providing tax services, we must disclose your tax return information to third party software vendors, tax preparers and other service providers that we partner with. Because this impacts the quality of service we provide and the costs we incur, we may decline to provide you with tax services or change the terms (including the cost) of the services that we provide to you if you do not sign this form.

If you agree to the disclosure by signature below, your consent is valid for one year from the date of signature.

x \_\_\_\_\_ / \_\_\_\_\_  
Taxpayer Date

x \_\_\_\_\_ / \_\_\_\_\_  
Spouse (if filing jointly) Date

\_\_\_\_\_  
Taxpayer Printed Name Social Security No.

\_\_\_\_\_  
Spouse Printed Name Social Security No.

\_\_\_\_\_  
Taxpayer Date of Birth State of Residency

\_\_\_\_\_  
Spouse Date of Birth State of Residency

\_\_\_\_\_  
Taxpayer Email Cell Phone

\_\_\_\_\_  
Spouse Email Cell Phone

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City, State, Zip

Filing Status (check one):

Married

Married Filing Separately

Single

Head of Household

Widow(er)