TYNDALL STROUD | CPAs, P.C.

Tax Return Engagement Letter

*****NOTICE: THIS FORM MUST BE SIGNED BY YOU AND RETURNED TO OUR OFFICE ALONG WITH THE ATTACHED PAYMENT UNDERSTANDING FORM (if applicable) BEFORE WE CAN PREPARE & E-FILE YOUR RETURNS.**

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.

We will prepare your 2020 Federal and requested State income tax returns from information which you will furnish to us. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. We will furnish you with questionnaires and/or worksheets when needed to guide you in gathering the necessary information. Your use of such forms will assist in keeping the return preparation fee to a minimum.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, canceled checks and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns and, therefore, you should review them carefully upon completion.

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations or other irregularities, should any exist. We will render such accounting and bookkeeping assistance as determined to be necessary for preparation of the income tax returns at an additional fee under separate engagement.

We will use professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities, interpretations of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.

The law provides various penalties that may be imposed when taxpayers understate their tax liability. If you would like information on the amount or the circumstances of these penalties, please contact us.

Your returns may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred.

Our fee for these services will be based upon the amount of time required at our standard billing rates. Additional fees will be charged for the preparation of form 8962 premium tax credit reconciliation and the determination of the new qualified business deduction and will further be determined by any other forms that are required. Our minimum personal tax return preparation fee is $220 for adults and $65 for dependent children. Due to the Affordable Care Act, additional charges may apply depending on the compliance complexity of your return. Also, tax research may be required to clarify a position on your return and to resolve various tax uncertainties that may arise. If so, you will be billed accordingly for these services. These additional charges will be discussed during your appointment before we proceed with your return. Corporations, partnership and other returns are billed at an hourly rate of $160. We will also charge for any out-of-pocket expenses (postage, UPS). All invoices are due and payable upon completion of our work.

Please note that you must pay for the preparation of your tax returns when you pick them up from our office or before they are emailed or mailed back to you. There will be no exceptions this year!

If the foregoing fairly sets forth your understanding, please sign in the space indicated below and return to us. However, if there are other tax returns you expect us to prepare, such as gift and/or property, please inform us by noting so at the end of the letter.

We want to express our appreciation for this opportunity to work with you. We continue to accept new clients. If you know anyone needing assistance, your referral will be appreciated. As in the past, we will strive to provide the best possible service to you. Any suggestions that would help us improve our service to you would be welcomed.

Sincerely,

Tyndall Stroud CPAs, P.C.

Accepted By:_______________________________________
Client signature

Date: ______________________

TYNDALL STROUD CLIENT PERSONAL TAX INFORMATION SHEET

(Please complete even if you have provided the same information in the past)

TAXPAYER		SPOUSE	
Name		Name	
Date of Birth		Date of Birth	
Occupation		Occupation	
Cell Phone #		Cell Phone #	
Home Phone #		Home Phone #	
Email Address		Email Address	

FILING STATUS				
□ Single	□ MFJ	□ MFS	□ HOH	□ QW
If filing status changed during the tax year due to death, please provide date here ➡				/ /

Dependent Name	Date of Birth	SSN	Relationship	Child Care Y/N	College Tuition Y/N

BANK ACCOUNT INFORMATION		
□ Check box if bank account information is the same as last year.		
□ Check box to have balance due on tax return automatically drafted from bank account, if applicable.		
Bank:	Routing#	Account#

DRIVER'S LICENSE INFORMATION (for identity protection)			
(Taxpayer) State	Number	(Spouse) State	Number
Issued	Expires	Issued	Expires

HEALTH INSURANCE INFORMATION	
Were you enrolled in the Affordable Care Act/Obamacare/Marketplace? **If yes**, provide form **1095-A,** if applicable.	□Y □N

OTHER INFORMATION	
Did you sell, purchase, or exchange any financial interest in virtual/digital currencies? **(i.e. BITCOIN**). **If yes**, provide form **1099-B**, if applicable.	□Y □N
Did you sell a home in 2020? If yes, provide **Alta Closing statement/1099-S**.	□Y □N
Have you received your stimulus check from the IRS at the time of your tax preparation? **If yes**, how much did you receive? **$**_______________	□Y □N
Did you have any internet purchases that you owe sales tax on? **$**_______________	□Y □N
Did you receive a PPP loan or EIDL loan for COVID-19? If yes, list the amount **$**__________	□Y □N
Would you like to receive our free e-mail newsletter?	□Y □N

How would you prefer to receive your completed return?
□ Pickup at office □ Emailed (password protected) □ Mail (additional $7 fee for mailing)

 Signature________________________