



Tax Year 2019

Client Information Form

Name(s): _____

Occupation(s): _____

Dependent Name & Birthdate: _____

(list all dependents)

Address: _____

Phone Number(s): _____

Email Address: _____

What is your preferred method of contact? Phone Email

Are you a new client? Yes No

If so, how did you hear about us? _____

If you receive a refund, would you like it direct deposited? Yes No Same as last year

Bank Name: _____

Routing #: _____

Acct. # _____

Client Copy: Hard Copy Email PDF Both

For Office Use Only:

	Date	Initials
Date In:		
Date out:		

	Date	Initials
DL:		
DL (spouse):		

	Date	Initials
Prepare:		
Review: A K S		

	Date	Initials
Payment:		
Rec'd 8879:		

	Date	Initials
E-file sent:		
E-file accepted:		

Notes: _____



Dear {client}:

This letter is to confirm our understanding of the terms of our agreement and outline the nature and extent of services we will provide. Based upon the information you furnish to us, we will prepare your federal and applicable state income tax returns for the 2019 tax year.

We will not audit or verify the data you submit to us, although we may ask you for clarification when necessary. All the information you submit to us will, to the best of your knowledge, be correct and complete and include all other information necessary for the completion of your tax return.

We will also prepare 2020 estimated tax vouchers, if required, based on your income and withholding taxes for 2019. If you anticipate a substantial change in income or withholding taxes for 2020, please advise us as soon as possible. We will then determine whether an adjustment should be made to your tax estimates.

Your returns are subject to review by the taxing authorities. Any items that may be resolved against you by the examining agent are subject to certain rights of appeal. In the event of an examination, we will be available upon request to represent you, or to review the results of any examinations. Billing for these additional services will be at our standard rates.

We will not e-file your tax returns until your tax preparation fees have been paid in full. Our minimum fee for an individual tax return is \$130. Please review our price sheet to get a better idea of the total amount for your tax preparation. Also, throughout calendar year 2020 (not while we are preparing your taxes), we have the right to charge for additional tax questions (via phone or email) and/or additional copy of your tax return requested.

You have the final responsibility for your income tax returns. Please review them carefully before you sign and/or mail them.

If the above is in accordance with your understanding of the terms and conditions of our agreement, please sign and return a copy of this letter.

Abby Selby, CPA

Accepted By:

Client Signature: _____

Date: _____