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## Letter of Engagement for Tax Preparation

### **IMPORTANT**

Due to new IRS fines and penalties, we now require a client interview for every client, and require that you provide us with all required information we request to substantiate and properly report all items on your return as required in accordance with The Small Business Work Opportunity Act of 2007.

### **CLIENT NOTICE**

We are required to advise every client of important rules related to the preparation of any tax return, and to disclose to every client the requirements of the IRS in return preparation. This Disclosure and Acknowledgment provides you with the important information related to the rules in preparation of your tax return and that you have read, understand, and acknowledge this disclosure. **PRIVACY POLICY** - we do not release client data except when 1) required by law or per tax authority regulation, or 2) upon the express direction of the client.

### **OUR FEES**

Our fees for tax preparation are based on the complexity of the return, the number of schedules and forms necessary and required by the taxing authorities to complete an accurate final return plus out-of-pocket expenses we incur. Fees are due and payable upon presentation of our invoice to you no later than when you pick up your return. We reserve the right to collect a deposit for services upon our initial meeting.

### **CLIENT ACKNOWLEDGMENT**

I, the below signed taxpayer (and spouse, if applicable) ("Client(s)") do hereby acknowledge that I have completed the tax return interview and have been directly interviewed in the completion of the "Interview Checklist" as requested to ensure that reasonable care is taken in the preparation of my tax return.

I further acknowledge that I have answered all questions, provided all responses, and have disclosed all information regarding income, expenses, deductions, and exemptions in an effort to ensure that my return is prepared accurately.

I further understand that it is my responsibility to accurately provide correct information to my tax preparer to assist in the preparation of my return. Accordingly, and to the best of my knowledge and belief I have provided accurate, complete and full disclosure of all required reporting items related to the preparation of my tax return as required by **RECORD KEEPING REQUIREMENTS**.

I acknowledge, accept, and understand that my tax preparer has advised me of reporting record keeping, substantiation, and filing requirements related to my tax return. Further, I have been advised by my preparer that they must sign my tax return as the preparer if there is payment for the preparation of the return. My preparer has provided me with all the preparer information as may be required in connection with the preparation of my return including but not limited to:

- **RECORD KEEPING REQUIREMENTS** - Include but not limited to invoices, receipts, logs, books & other evidence to support any item reported on your tax return
- **SUBSTANTIATION REQUIREMENTS** - Include but not limited to reporting to the IRS any item on your return where you believe there may be less than a 50% chance of that item being sustained if examined by the IRS and failure to do so and report it on Form 8275 or 8275R may result in additional penalties
- **FILING REQUIREMENTS** - Include but not limited to reporting all income and that you properly report all expenses, deductions, credits, and exemptions as the case may be correctly and that you take reasonable care to ensure all information reported on your return is accurate and that you file and pay timely
- **IRS DISCLOSURE REQUIREMENTS** - Include but not limited to the compilation of all of the items mentioned herein
- **RETURN PREPARER REQUIREMENTS** - Include but not limited to our signing the return as the paid preparer, if in fact we charged for our service

Should a taxing authority want to examine your return (audit), any items resolved against you are subject to certain rights of appeal. In the event of an examination, we will be able to represent you and our fees for this service is at our standard rates for the nature of the services performed and are in addition to the services and fees paid for the preparation of your tax return.

I acknowledge, accept, and understand that I am personally liable for all taxes, penalties, interest and other amounts related to any determination by the tax authority resulting from an audit, or notice of adjustment or other action where my tax liability may be changed, and further hold harmless from all claims of liability in connection with my tax obligations.

I certify that I have to the best of my knowledge and belief provided all required information and disclosures in connection with the requirements of tax reporting in connection with the preparation of my tax return.

This agreement shall cover our relationship for all tax returns we prepare for you. This agreement does not obligate you to use our services at any future date and may be terminated by either party at any time.

I have read, understand, and acknowledge the above items have been disclosed and explained to me in regards to the preparation of my tax return and I further agree to adhere to the requirements imposed by the code as state above.

DATE: \_\_\_\_\_

TAXPAYER  
PRINT NAME: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

SPOUSE  
PRINT NAME: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_



Federal law requires this consent form be provided you. Unless authorized by law, we cannot use, without your consent, your tax return information (including your name, address, and contact information) for purposes other than the preparation and filing your tax return.

You are not required to complete this form. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year.

Duration of Consent (options): One (1) year from date of signature.

I \_\_\_\_\_  
Print Name

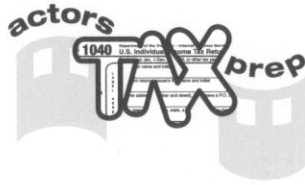
authorize Actors Tax Preparation, Inc. to use my information that I/we have provided and any information they glean from the preparation of my tax return for their own (in-house) purpose of suggesting, promoting, and marketing products and services that Actors Tax Preparation, Inc. may want to suggest or offer.

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (AIGTA) by telephone at 1-800-366-4484, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature (if married, filing Joint, both signatures are required)

\_\_\_\_\_  
Date



### Consent to Disclosure of Tax Return Information

\_\_\_\_\_ (“we”, “us”, and “our”)  
Print name of tax payer

Federal law requires this consent form be provided to you (“you” refers to each taxpayer, if more than one). Unless authorized by law, we cannot disclose, without your consent, your tax return information to third parties for purposes other than the preparation and filing of your tax return. 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.

You are not required to complete this form. If we obtain your signature on this form by conditioning our services on your consent, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year.

In order to process your return we must disclose all of your 2011 tax return information to Paul Littlefield that we partner with in order to provide certain services.

If you will allow us to disclose your 2011 tax return information for this purpose, sign and date your consent to the disclosure of your tax return information.

By signing below, you (including each of you if there is more than one taxpayer) authorize us to disclose all of your 2011 tax return information. If you are not willing to authorize us to share your tax information with those listed, you can still choose to have your tax return prepared and filed by us for a fee.

Printed name of taxpayer: \_\_\_\_\_

Taxpayer signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed name of joint taxpayer: \_\_\_\_\_

Joint taxpayer signature: \_\_\_\_\_ Date: \_\_\_\_\_

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by e-mail at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).