

***IMPORTANT
HAVE YOU PROVIDED THE FOLLOWING?***

- | | | | |
|---|------------|-----------|------------|
| 1. Your current email address(es) and home and mobile phone number(s)? | <i>yes</i> | <i>no</i> | |
| 2. Your original Forms W-2, 1099, 1099R, SSA-1099 and 1098? | <i>yes</i> | <i>no</i> | <i>N/A</i> |
| 3. A copy of your Driver's License (this is required for some states) | <i>yes</i> | <i>no</i> | |
| 4. If your dependent child filed their own tax return did they claim themselves as a dependent? | <i>yes</i> | <i>no</i> | |
| 5. Do you have a foreign account? | <i>yes</i> | <i>no</i> | |
| 6. Summary totals of your 2019 medical bills? | <i>yes</i> | <i>no</i> | <i>N/A</i> |
| 7. If you sold stock in 2019, have you provided the original cost and date acquired? | <i>yes</i> | <i>no</i> | <i>N/A</i> |
| 8. If you purchased or sold real estate or refinanced during 2019, have you included the closing statements? | <i>yes</i> | <i>no</i> | <i>N/A</i> |
| 9. If you wish to have your refund or tax payment processed electronically, please provide a copy of a voided check from your checking account. | <i>yes</i> | <i>no</i> | <i>N/A</i> |
| 10.If you purchased a new vehicle in 2019, have you provided a copy of the purchase invoice showing the sales tax paid? | <i>yes</i> | <i>no</i> | <i>N/A</i> |
| 11. If you have a child 18 or older who was a college student during 2019, have you provided Form 1098-T? | <i>yes</i> | <i>no</i> | <i>N/A</i> |
| 12. If you made an IRA contribution for 2019, have you written the amount, date and type of IRA (Regular, Roth or Nondeductible)? | <i>yes</i> | <i>no</i> | <i>N/A</i> |
| 13. If you did not make an IRA contribution for 2019, would you like to discuss your options? | <i>yes</i> | <i>no</i> | |

Please do not staple any of your tax documents.

YOUR IMMEDIATE ATTENTION REQUIRED

PLEASE RETURN THIS FORM TO US WITH YOUR TAX INFORMATION

(Client Name)

All tax returns prepared beginning January 1, 2020 require that you select how you want to receive a copy of your tax return. **Please check one.**

_____ **Email** – print clearly _____@_____
(Default method)

_____ **Paper copy**

Please note that any emails will be **password protected**.

Before your work can be started, you are required to provide us with your credit card information.

Visa, MasterCard, AMEX & Discover

_____ **Visa** _____ **MasterCard**
_____ **AMEX** _____ **Discover**

_____ AMEX (4 digit) code on front **(REQUIRED)**

_____ Visa, MC or Discover (3 digit) code on the back **(REQUIRED)**

Name on Card _____

Account # _____ Expiration Date _____

2020 ENGAGEMENT LETTER (Retain in your files)

Dear Client,

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 Federal income tax return for 2019 and each year thereafter, as well as, your applicable state and local income tax return(s), from information you provide. We will not audit or otherwise verify the data you submit, although we may ask you to clarify some of it. We will furnish you with questionnaires and worksheets to guide you in gathering the necessary information. Your use of such forms will assist in keeping pertinent information from being overlooked.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You are required to retain all the documents, cancelled 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.

Our firm is required by the taxing authorities to file electronically all forms that qualify. Therefore, you can expect your return to be filed electronically if it qualifies.

The filing deadline for the tax return is April 15, 2020. In order to meet this filing deadline, the information needed to complete the return should be received by us no later than **March 13, 2020**. If an extension of time to file is required, any tax that may be due with this return must be paid with that extension. Any amounts not paid by the filing deadline are subject to interest and penalties when those amounts are actually paid.

Throughout the year, we will be available to provide estate planning, tax planning, financial planning and such other tax services as you may request to assist you in making decisions with respect to your financial affairs. Our services may include analysis of prior income tax returns and the review of your current and proposed investments. We may analyze proposed investments from the standpoint of their tax aspects and your financial position and goals, but we will offer no recommendations as to the investment quality of any specific investment.

Our professional fee will be based upon the amount of time required at our standard rates. You will be billed with the completed return, and the invoice is due and payable upon presentation. It is agreed that any fees not paid at the time the return is completed are subject to a finance charge of 1½% per month (18% per annum) for each month the balance is past due. In the event of nonpayment for services rendered, you will be liable for all legal and collection fees incurred. New clients who have not established a credit history with our firm may be required to pay for our services prior to the release of their completed returns. We will notify these clients of the rate charged prior to release.

There will be a reprocessing charge for tax returns which need to be recalculated should you provide us with additional information after the tax returns have been finalized. There will also be an additional charge for amended returns that need to be prepared (minimum charge \$250.00).

Your tax returns, of course, are subject to review by taxing authorities. Any items resolved against you by the examining authority are subject to certain rights of appeal. In the event of any examination, we will be available to represent you. Billing for such services will be at our standard rates for the nature of the service performed.

We will try to resolve uncertainties involving application of tax rules in your favor, if there is reasonable justification for it; however, you have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign and file them.

By submitting your personal tax information to our offices, you agree that you have read, understand and agree to the terms of our Engagement.

We are pleased to have you as a client and look forward to a long and mutually satisfying relationship.

Very truly yours,



Mills and DeFilippis
Certified Public Accountants, LLP

/ld

m&d/tax organizer