

# AMERI TAX SERVICE

SAVING AND FINDING YOU MONEY SINCE 2001

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## **ENGAGEMENT LETTER**

Thank you for choosing Ameri Tax Service (ATS) to assist you with tax preparation services. Please initial this page to confirm your understanding of its services.

\_\_\_\_\_ We will be preparing your federal and state tax returns from the information you provide to us. Our fee includes preparing your federal and state tax returns for any given year. Each tax year has its own unique fee.

\_\_\_\_\_ We will provide you with a full copy of your return and return all your original documentation. You will need to keep it for your records for at least 5 years. Some returns may need to be kept longer. You are responsible for keeping copies of all supporting documents like W2s, mileage logs, receipts.

\_\_\_If you need additional copies, or pdf copies, we reserve the right to charge you a minimum \$10 fee.

\_\_\_\_\_ If you get a letter from the IRS, please call and provide us with a copy ASAP ([AmeriTax3327@gmail.com](mailto:AmeriTax3327@gmail.com)). In most cases, we will be able to handle it entirely for you at no additional charge, including drafting letters and making necessary phone calls.

\_\_\_\_\_ Your fee includes complementary consultations including, say, questions about buying a new home or car, how to fill out your W4 form, how and when to pay quarterly taxes, how to position your business for sale, considering buying a rental property, and such. In general, a consultation that lasts 60 minutes or less is free, complementary, gratis, if you are a current client. Anything over that time limit or if you are not already a client, consultations run \$\$65 per half hour.

\_\_\_\_\_ If you have purchased health insurance and received a subsidy at any time during the year, you will need to provide us with a form 1095.

\_\_\_\_\_ You will need you to provide us a Social Security card copy for everyone in your household and a driver's license (or licenses if married). We may also request documentation proving that your dependent lives with you.

\_\_\_\_\_ You will need you to provide your income documentation (W2s, 1099s, Stock Brokerage statements, K-1s, etc.). Please bring it opened or printed if you received it digitally. There may be a \$10 document fee for printing/downloading. We may keep copies of W2s and 1099s, but we are not required to do so.

*(Over)*

\_\_\_\_\_ You will need you to provide expenses to us (home mortgage, property tax, charitable expenses, business expenses), summarized on paper (it does not have to be typed). If we download documents there may be a fee charged (\$10). If we create your summary sheet of expenses for you, there will be a \$35 charge.

\_\_\_\_\_ We do not mail in any tax returns for you or any payment to any taxing authority for you for any reason. The liability is just too great. Please remember if you are a single-member LLC you must paper mail your Form 568.

\_\_\_\_\_ There is no additional fee to use debit cards or checks. However, there is a \$5 fee to use a credit card.

\_\_\_\_\_ In preparing returns, unless you tell us otherwise, we will assume you:

- Have no foreign bank accounts
- Do not receive or pay alimony
- Do not have carry over expenses from a previous year
- Did not move, get married or have a new baby 😊

\_\_\_\_\_ If you are filing joint and your spouse is not in attendance with you, by signing this document you are agreeing that you are the designated Tax Matters partner for your family and that your spouse has been apprised of your decision to proceed with Ameri Tax Service's tax preparation services.

Over the years the responsibility for preparing tax returns has greatly increased—from compliance requirements to insure there is no identity fraud, to reporting and tracking your medical insurance.

We are licensed, insured and bonded.

We take the mandatory continuing educations requirement. We take many more hours of specialized training to insure we are better than the rest.

We subscribe to many newsletters and organizations to stay on top of tax strategies, loopholes and red flags.

To acknowledge that you understand the services we are providing, please sign below. We thank you for your trust.

Ameri Tax Service

Accepted by:

\_\_\_\_\_  
Tax Payer Name

Date: \_\_\_\_\_

\_\_\_\_\_  
Tax Payer Name (printed)