

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 these pages to confirm your understanding of its services.

_____ We will be preparing your federal and state tax returns from the information you provide to us. It is in your best interest to provide all your tax documents. We cannot file what we do not have. 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 paper or digital 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 paper or pdf copies, we reserve the right to charge you a minimum \$20 fee.

_____ If you get a letter from the IRS, please call and provide us with a copy ASAP (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 complimentary consultations including, say, questions about buying a new home or car, how to fill out your W4 form, and 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 30 minutes or less is free, complimentary, gratis, IF you are a current client. Anything over that time limit or if you are not already a client, consultations run \$95 per half hour and time thereafter will be charged at \$95 per half hour.

_____ If you have purchased health insurance through Covered California and received a subsidy at any time during the year, you will need to provide us with a form 1095. There may be more than 1 1095 per household. Returns will be rejected by the IRS if this information is not included in tax return.

_____ You will need to provide us with a Social Security card copy for everyone in your household and a driver's license (or licenses if married). We may also request additional documentation if applying for Child Tax Credit or Earned Income Credit proving that your dependent lives with you.

_____ You will need to provide your income documentation (w2s, 1099s, Stock brokerage Statements, K-1s, Mortgage Interest Paid documents, etc). Please bring it opened or printed if you received it digitally. There may be a \$20 document fee for printing/downloading, password resetting, etc. We may keep copies of W2s and 1099s but are not required to do so.

_____ You will need to provide expenses to us (home mortgage, property tax, charitable contributions, business expenses) summarized on paper(does not have to be typed). If we download documents from bank, brokerage, or assessor offices, there may be a fee charged (\$20). If we have to create your summary sheet of expenses for you, there will be a \$60 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, pay your \$800 Franchise Tax Fee and file your Statement of Information and Business Owner Information Report. If you'd like us to do that for you, we can quote you our rate.

_____ There is 1% additional fee to use debit or credit cards.

_____ You are responsible for double and triple checking your bank account direct deposit information. We are not responsible for incorrect deposits that are misdeposited.

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

- Have no foreign bank accounts (You may need an FBAR)
- Do not receive or pay alimony
- Do not have carry over expenses from a previous year (including stock losses, charity, passive rental losses, etc)
- Did not move, get married, or have a new baby 😊

_____ If you are filing jointly 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 ensure that there is no identity fraud, to reporting and tracking your medical insurance,

Please Note:

- We are licensed, insured, and bonded
- We take the mandatory continuing education requirement, We take many more hours of specialized training to ensure we are better than the rest.
- We subscribe to many newsletters and organizations to stay on top of tax strategies, loopholes, and red flags.

It is your responsibility to provide a complete picture of your financial assets and income. To acknowledge that you understand the services we are providing, please sign below. We thank you for your trust,

Accepted By:

Taxpayer Signature

Date: _____

Taxpayer Name (Printed)