

TAX CLIENT DATA SHEET

Taxpayer		
Spouse		
Address		
City	State	Zip
Taxpayer Contact #	Spouse Contact #	EMAIL:

- Yes No Did your filing status change for 2020?
- Yes No Did the number of dependents in your household change for 2020?
- Yes No Did you refinance your home in 2020?
- Yes No Does anyone in your household qualify for credits for college expenses?
- Yes No Do you have signature authority over a foreign bank account of \$10,000 or more?
- Yes No At any time in 2020, did you receive, sell, exchange or otherwise acquire any financial interest in virtual currency?

Affordable Care Act Information:

Yes No Did you have health insurance through the Marketplace in 2020?

If so, please be sure to send form 1095-A from the Healthcare Marketplace.

STIMULAS CHECK INFORMATION:

YES NO Did you receive a Covid Stimulus payment in 2020?

If so, list the amount received: \$ _____

OUR FIRM HAS ELECTED TO PROVIDE OUR CLIENTS WITH THEIR TAX RETURN COPY IN AN ELECTRONIC FORMAT (SECURE EMAIL) IF FOR SOME REASON YOU PREFER TO RECEIVE A PRINTED COPY INSTEAD, PLEASE CHECK BELOW:

PAPER COPY REQUESTED

Is your bank account for direct deposit the same as last year?

Yes No



Bottom Line Tax Solutions
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TAX ENGAGEMENT LETTER

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 2020.

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 2021 estimated tax vouchers if required, based on your income and withholding taxes for 2020. If you anticipate a substantial change in income or withholding taxes for 2021, 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 examination. Billing for these additional services will be at our standard rates.

The charges for our services are based on our fee schedule and the complexity of the returns. **Invoices are due and payable upon completion of the return. We cannot E File your return until payment has been received.**

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

Accepted by:

Client signature

Date