CLIENT INTAKE

( ) NEW*

Taxpayer	Spouse
Phone	Phone
E-mail	E-mail

Address (if new)	Move-in Date
City/State/ZIP	

Married (date): / /2019	Divorced (date): / /2019	*we cannot begin work without copies of 2018 returns (including depreciation schedules, if rentals)

ADD/REMOVE DEPENDENTS

NAME	BIRTHDATE	SOCIAL SECURITY NUMBER	RELATIONSHIP	REMOVE

N/A	T	S	ITEM	FORM
			Estimated tax payments (federal/state/local)	Schedule with dates/amounts
			HSA contribution (excluding employer contribution)	5498-SA
			HSA distribution	1099-SA
			Traditional IRA contribution	Document from custodian
			Traditional IRA distribution	1099-R
			Roth IRA contribution	Document from custodian
			Roth IRA distribution	1099-R
			Health insurance through the marketplace (including dependent coverage)	1095-A
			Paid or received alimony. Date of original agreement:	CSEA register
			Date of death (after 2018 only):	Death cert & Notice of appt

N/A	T	S	ITEM
			Purchases (online, catalog, & TV) subject to State use tax: $
			Interest in virtual currency (Bitcoin) any time during the year. Provide documentation
			Interest in foreign bank account(s) exceeding $10,000. Furnish highest balance per account and bank information, if new
			Interest in foreign brokerage account(s) exceeding $50,000. Furnish December 31 brokerage statement(s)
			Payment(s) made reportable on Form(s) 1099 Filed or will be Yes / No

DIRECT DEPOSIT	ROUTING NO	BANK NAME	ACCOUNT NO	C/S
[attach copy of voided check]				

CHARLES P VONDERHAAR CPA LLC

Our Responsibilities & General Information

- Prepare your 2019 federal, state and local income tax returns based on information provided by you. Preparation neither includes nor do preparation fees cover –
    - Auditing or verifying your information, books or records. In the event your return is audited, you will be responsible for substantiating items reported
    - Bookkeeping
    - Amending returns
    - Audit representation or preparing materials to respond to correspondence from taxing authorities, banks, or others
    - Tax forecasting or tax planning
- To file by original due date, please observe following cut-off dates: 1120S/1065 – February 17; 1040 – March 13. If substantially all information is not received by cut-off, extensions will be filed
- Engagement to prepare your 2019 tax returns terminates upon (1) the earlier of the delivery of your completed returns and original documents to you or (2) within 180 days of the signing this engagement letter. We are not responsible for your original documents after engagement termination. Please store them along with copies of your tax returns in a safe place for at least seven years
- Fees **must** be paid before your tax returns are delivered to you or e-filed

Your Responsibilities

- Complete Tax Organizer (if applicable), Client Intake Form **(on back)** and provide information on all income items, deductions and credits. If you receive additional information after preparation begins, contact us immediately to ensure your completed tax returns contain all relevant information
- Provide copies of 2018 tax returns (**including depreciation schedules**, if you own rental real estate) (if new client). We **cannot** begin work without these documents
- Respond timely to "Missing Information" requests
- Review the returns carefully before signing to make sure they're correct
- Affirm that all income items, deductions, and credits are accurate and that you have all required written documentation. In some cases, we may request additional information or ask to review your documentation
- Provide written records of all items included on your return, if requested by taxing authorities. We can provide guidance concerning what substantiation is acceptable

Privacy Policy. The nature of our work requires us to collect certain nonpublic personal information about you from various sources. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to any third party without your express permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.

To the best of my/our knowledge, the information provided includes all income items, deductions, and other information necessary for the preparation of this year's income tax returns for which I have adequate records. I/we agree to the terms of this engagement letter.

______________________________ Date: ______________ __________________________ Date:__________________

Taxpayer Signature   Spouse Signature