TAX & Accounting Specialists
LeAnn Wilson & Associates, Inc.

2020 Individual Income Tax Engagement Letter

We appreciate the opportunity to work with you. This agreement confirms the services you have asked our firm to perform and the terms under which we will perform that work. Please read this letter carefully because it is important to both our firm and you to understand what will and will not be expected. **Tax preparation will not be initiated by our firm without this signed engagement for services each year.**

We will prepare your Individual Federal and State Income Tax Returns and related schedules for 2020 tax year using the information you provide us. If you have taxable activity in a state other than Colorado, you are responsible for informing us of the applicable state(s). It is your responsibility to meet documentation requirements and to provide us with all necessary information to complete your tax returns. We will not audit or verify the data you submit to us; however, we may ask you for additional information. Before signing, review carefully for accuracy and completion, as well as omissions or misstatements as you have ultimate responsibility for the information reported on your income tax returns.

You should retain copies of all documents, receipts, canceled checks, and other records needed to substantiate the items of income and deductions which are claimed on your return. We do not keep original documents. Any original information and documentation you provide will be returned to you upon completion of your tax returns. We will provide a copy of your tax return for your records. That delivery will be in the medium of your request: email or paper copy. Additional copies, either email or paper, will be provided for a fee of $60 to be paid in advance of releasing said copies. We will not release your information to anyone without your prior written consent. Dependents 16 and over, which are required to file an income tax return, must provide written consent to us in order to release documents to their parents. All tax returns not picked up within 30 days of completion will be assessed a $10 monthly finance charge.

Fees for our services will be at our standard rates. Your income tax preparation fee does not include bookkeeping services, tax planning, tax projections, or tax consultation services. Other additional fees may include copy costs and computer processing fees. Payment is due upon completion. All income tax return preparation fees must be paid in full prior to the release of the return. We are not responsible for any late fees, penalties or interest imposed by the various taxing authorities for failure to file timely. Any preparation services canceled prior to completion will be billed for time spent at the standard hourly rate of $170 per hour.

We must receive all information necessary to prepare your return by **March 27, 2021**, to ensure that your return will be completed by April 15, 2021. If we do not have all the necessary information, you will need to file a request for an extension of time to file. Fees for this service begin at $40. We will not file extensions unless you specifically request us to do so. If you wish for us to prepare an extension for you, you must notify us by **March 27, 2021**. You must provide us with adequate income information, for us to estimate the amount of tax that you should send with your extension. Filing an extension does not relieve you from paying any tax due on the due date of the extension. Failure to pay any tax due with the extension or failure to pay the quarterly estimated tax payments may subject you to various penalties and interest. This estimate will be based solely on the information you provide to us, and we are not responsible for under estimation of tax due to missing information. If an extension ***is not filed,*** you may be subject to late filing or late payment penalties by the taxing authorities.

Your returns are subject to review by taxing authorities. Should an examination occur, we will be available to represent you for an additional fee. If you wish us to represent you it is imperative that you notify us immediately upon receipt of a notice from a taxing agency proposing a change to any income tax return.

In the interest of facilitating our services to you, we may communicate by fax or e-mail. Such communications may include information that may be confidential to you. While we will use our best efforts to keep such communications secure in accordance with our obligations under applicable laws and professional standards, you recognize and accept that we have no control over the unauthorized interception of these communications once they have been sent and you consent to our use of these devices during this engagement.

You, as our client, shall agree to limit the liability of the firm for any and all claims, costs, damages, losses or penalties of any nature whatsoever, so that the total aggregate liability of the firm to the client shall not exceed the firm's total fee for services rendered under this agreement. The client and the firm intend and agree this limitation applies to any and all liability or cause of action against the firm, however alleged or arising, unless otherwise prohibited by law. Both parties agree there is a one-year limitation period to bring a claim against the firm for errors or omissions. The one-year period will begin upon the date of signing this agreement.

Estimated tax payments required for 2021 will be calculated according to current tax law legislation.

We appreciate the opportunity to serve you. We are pleased to have you as a client and look forward to a long and mutually satisfying relationship. If you ever have any questions or feel like you need advice regarding a tax or financial matter, please do not hesitate to call us.

Please date and sign below to acknowledge your understanding of the terms and acceptance of your responsibilities of this engagement for the current tax year. **It is our policy to initiate services after we receive this signed engagement letter.**

______________________	______________________	__________
Print Your Name	**Signature**	**Date**
______________________	______________________	__________
Print Spouse's Name	**Signature**	**Date**

Please provide your preferred phone number and e-mail address:

Phone: ______________________________________

E-mail address: ______________________________________

Best Regards,

Tax and Accounting Specialists
LeAnn Wilson & Associates, Inc.

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Referred By:____________________
New Client:________Returning Client:________

2020 Tax Year Questionnaire

Please complete the following information so we may update our records. If your information is the same as last year and we have prepared your tax returns in the past, just write "same". **See the reverse side for important questions.**

Taxpayer Information:

Last name____________________First name____________________Middle initial______
Social Security Number____________________Occupation____________________
Date of birth____________________Work phone____________________Cell phone____________
E-mail address____________________
Driver's License #____________________State_____Issue Date__________Exp. Date____________
Health Ins. Coverage None:______Full Year:_____Partial (provide details):____________________

Spouse Information:

Last name____________________First name____________________Middle initial______
Social Security Number____________________Occupation____________________
Date of birth____________________Work phone____________________Cell phone____________
E-mail address____________________
Driver's License #____________________State_____Issue Date__________Exp. Date____________
Health Ins. Coverage None:______Full Year:_____Partial (provide details):____________________

Dependent Information: (please attach additional dependent information if necessary)

Last name____________________First name____________________Middle initial______
Social Security Number____________________Date of birth____________________Circle: Son / Daughter
Health Ins. Coverage None:______Full Year:_____Partial (provide details):____________________

Last name____________________First name____________________Middle initial______
Social Security Number____________________Date of birth____________________Circle: Son / Daughter
Health Ins. Coverage None:______Full Year:_____Partial (provide details):____________________

Address Information:

Street address____Apt. number________
City____________________County____________________State____________Zip__________

For your files, how would you like to receive a copy of your tax return? Electronic_____ *(No charge)* Hard Copy_____ *(No charge)* Both_____ *($50)*

Direct Deposit Information: Please provide a voided check, or the following bank information:

Bank name____
Acct number____________________Routing number____________________Circle: Checking/Savings
I do not want my refund direct deposited: Check Here______

Estimated Federal & State Income Tax Payments:

Did you make any estimated tax payments for 2020? Circle: Yes/No If yes, please provide *exact* amounts and dates:

	FEDERAL AMOUNT	DATE PAID	STATE AMOUNT	DATE PAID
1st Qtr Due April 15	$__________	__________	$__________	__________
2nd Qtr Due June 15	$__________	__________	$__________	__________
3rd Qtr Due Sept 15	$__________	__________	$__________	__________
4th Qtr Due Jan 15 (2021)	$__________	__________	$__________	__________

	Y	N		Y	N
Were there any births, marriages, divorces, deaths, or other changes in your household last year? If yes, explain:			Did you make cash or non-cash charitable contributions? Please provide details.		
Do you have dependents who have income, and must file a tax return?			Did you incur childcare or dependent care expenses?		
Can you be claimed as a dependent on another tax return?			Did you borrow against a home equity line of credit in excess of 100,000?		
Do you expect your income and deductions this year to be different from last year (e.g. retirement)? If yes, explain:			Did you buy, sell, or refinance a principle residence or other real property last year? If yes, include closing or escrow statements. If you refinanced, please provide documentation of funds disbursed.		
Did you live, own property, or earn income in more than one state last year?			Did anyone in your household have education expenses, student loans, or contribute to a 529 plan?		
Did you start a small business, purchase rental property or own a farm last year? Please request one of our business, rental, or farm worksheets.			Are you military and received reimbursements for moving? If so, please provide documentation.		
Are you an owner or shareholder in a corporation, S-corporation, or partnership? Please provide form(s) K-1			Did you work a part time or second job and use your vehicle for business use? Please provide beginning and ending odometer reading and a mileage log for the year.		
Did you receive or pay any alimony or maintenance payments? If so, provide a copy of the divorce decree, recipients SSN and amounts.			Did you have any medical or charitable miles? If so, please provide.		
Did you receive unemployment benefits?			Did you or your spouse, or dependents receive disability income?		
Did anyone in your household receive Social Security, retirement, annuity benefits or any Required Minimum Distribution Deferrals?			Did you or anyone in your household receive a health insurance premium credit? Please provide 1095-A, 1095-B, or 1095-C.		
Did you contribute to, or receive disbursements from, an HSA or retirement plan? Did you convert any funds to an IRA or Roth IRA?			Did you pay any long-term care insurance premiums on a qualified policy?		
Did you buy, sell, or trade stocks, bonds, mutual funds, or any other assets last year (including any virtual currency)?			Did you pay any medical expenses including health insurance premiums?		
Did anyone in your household have any interest, dividends or capital gains income?			Did you have any financial accounts or property in a foreign country?		
Did you file for bankruptcy or have a foreclosure, short sale or cancellation of debt?			Did you make any large purchases or home improvements? (A vehicle, trailer, energy saving appliances, etc.)		
Did you live in a federally declared disaster area and have any casualty / theft losses last year?			Do you wish to have $3 of your taxes applied to the Presidential Campaign Fund?		
Do you have a vacation home or do you rent out your personal residence (e.g. Airbnb or VRBO)?			Any charity or political contributions on state return?		
Has the IRS/State/Local taxing authority made you aware, or are you aware, of any changes to your income, deductions & credits reported on any prior tax returns?			Are you supporting anyone not living with you?		
Did you make any gifts during the year directly or in a trust exceeding $15,000 per recipient?			Did you pay wages of $1,900 or more in any calendar quarter during the year to any one household employee?		
Are any of your household members blind and/or disabled? Name:			Did you receive an Economic Stimulus Payment in 2020? If so, please provide Form 1444.		

Have you provided ALL your deductions and income from ALL sources? Please use the space provided below to include any additional information, or details for the above questions. If necessary, attach additional pages.

By signing below, I agree that the information included on this form and all other documentation provided to Tax and Accounting Specialists, Inc. is true and accurate to the best of my knowledge. I have all documentation for the income and deduction information I have provided.

Signature Taxpayer____________________ Date____________

Signature Spouse____________________ Date____________

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TAX & Accounting Specialists
LeAnn Wilson & Associates, Inc.

Privacy Policy
Of
Tax and Accounting Specialists
LeAnn Wilson & Associates, Inc.

Enrolled agents, like all providers of personal financial services, are now required by law to inform their clients of their policies regarding privacy of client information. We have always protected your rights to privacy.

Types of Nonpublic Personal Information We Collect

Tax and Accounting Specialists will only gather personally identifiable information that is provided to us by you or obtained by us with your authorization. Tax and Accounting Specialists limits the collection of information to what is relevant and necessary to accomplish services provided to you. Personal identifiable information or data includes, but is not limited to, information that is maintained by Tax and Accounting Specialists that identifies or describes an individual including his or her name, social security number, physical description, home address, telephone number, education, financial matters, medical history and employment history. Tax and Accounting Specialists only collects personal information that is appropriate for the type of service requested. The purposes for which personal identifiable data is collected shall be specified prior to the time of collection. Any subsequent use of the information is limited to purposes not inconsistent with the purpose(s) given at the time of collection. Tax and Accounting Specialists shall maintain in its records only personal information that is relevant and necessary to accomplish a service.

Parties to Whom We Disclose Information

For current and former clients, Tax and Accounting Specialists will not disclose, make available or otherwise use your personal information for purposes other than those specified, except with the consent of the subject of the data, or as required or permitted by law or regulation. In all such situations, we stress the confidential nature of information being shared.

Protecting the Confidentiality and Security of Current and Former Clients' Information

The general means by which personal identifiable data is protected against loss, unauthorized access, use, modification or disclosure includes, but is not limited to, taking reasonable precautions to protect the personal identifiable information on individuals and business collected or maintained by Tax and Accounting Specialists against loss, unauthorized access, and illegal use or disclosure. Tax and Accounting Specialists retains records relating to professional services to comply with IRS and professional guidelines. Personal identifiable information is stored in secure locations. Tax and Accounting Specialists maintain physical and electronic procedural safeguards that comply with IRS and our professional standards. Tax and Accounting Specialists staff is trained on procedures for releasing information, and access to such information is limited to staff whose work requires it.

Please call if you have any questions, because your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

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