

Listed are items needed in order for you to file your  
Income Tax Return:

-Photo ID  
-SSN Cards (You, Spouse, & Dependents)  
-Tax Documents (W2's, 1099's and Etc) \*If Self  
Employed, Proof of Business

**Personal Info:**

First Name:  
SSN:

MI:  
DOB:

Last Name:  
Email:

Spouse Name:  
SSN:

MI:  
DOB:

Last Name:  
Email:

Address:

City:

State:

Zip Code:

Home Phone:

Cell Phone:

Dependent Information – Do not include yourself or your spouse.

Please list everyone who lived in your home and anyone living outside your home that you support.

Name	DOB	Social Security	Relationship	Months live with you

1. Did you provide more than half of support for the dependents listed above? YES or NO
2. Have you ever had earned income credit disallowed by the IRS? YES or NO
3. Can you be claimed as a dependent on another person tax return? YES or NO
4. Did you have healthcare coverage for 12 months? YES or NO

If someone referred you to **Tax Group Pros** please list their name below:

Referred By:

Please indicate that the information above is correct best to your knowledge:

**Taxpayer Signature:**

**Spouse Signature:**

**This letter confirms the arrangements for our services. Please read this form and sign below.**

STANDARD ENGAGEMENT LETTER FOR TAX OR CONSULTING SERVICES

We will prepare your federal and state income tax returns from information you will furnish to us. We may process the returns through an outside computer service. We will not audit or otherwise verify the data you submit, although we may ask you to clarify some of it.

We will be available to assist and guide you in gathering the necessary information, by furnishing you with questionnaires or worksheets and by answering your questions. It is your responsibility to provide all the information necessary to complete your tax returns.

There are substantial penalties for claiming items on tax returns that you may not be able to prove clearly with written documentation during an audit examination. You represent to us that all information you furnish to us will be true, complete and accurate, and, in addition, that you have retained all necessary written support and documentation should it be required by an IRS or state audit examination at a later date. Since you have final responsibility for the information on the income tax returns, we highly recommend that you review the tax returns carefully before signing and filing them.

You agree to provide us with copies of any government correspondence that you receive regarding tax returns that we prepare for you. If a question arises interpreting tax law, and a conflict exists between the taxing authorities' interpretation of the law and other supportable positions, we will use our professional judgment in resolving these issues. Whenever possible, we will resolve the issues in your favor. We do not offer legal services, however attorney referrals are available.

The returns are prepared solely for presentation to the appropriate tax authorities. You agree not to utilize the returns for any other purpose (such as bank loans, etc.) without first obtaining our express written consent.

We will be available to answer your inquiries on specific tax and financial matters, and to consult with you or assist you on financial, tax, accounting, retirement, computer, and estate planning matters. We may analyze proposed investments in terms of your financial position and goals, as well as their tax aspects, but we will offer no recommendations as to the quality of any specific investment nor an evaluation of any potential business risks or opportunities presented by the investment. You must independently evaluate all the other facts of the investment.

Our fees are based on the time required by the individuals assigned to the engagement, plus out-of-pocket costs (including computer processing charges), according to our minimum fee schedule. Telephone or e-mail consultations, including mid-year consulting after the tax returns are done, are billed at the same standard rate as office visits. A service charge will apply to missed appointments and less than 24 hour notice of cancellations. Our invoices are due upon presentation. Tax returns are paid for in advance. The undersigned agrees to pay reasonable past due collection costs including: attorney's fees, collection agency fees, and preparer's time spent in collection at standard billing rates. Claims for reimbursement cannot exceed the cost for that service. No guarantee is made by preparer regarding allowance of any refund, credit or item as reflected on the returns.

If the foregoing is in accordance with your understanding of the terms and conditions of our engagement, please sign below.

**Each client is important to us! We are pleased to have you as a client and look forward to serving you now and for many years to come.**

**Very truly yours,**

*Read and accepted by:*

**Client's Name** *(please print)*

**Spouse Name:**

**Signature(s)**

**Spouse Signature:**

**Date**      /      /

## Consent to Disclosure of Tax Return Information

("we," "us" and "our")

(Printed name of Tax Preparer)

Federal law requires this consent form be provided to you ("you" refers to each taxpayer, if more than one). Unless authorized by law, we cannot disclose, without your consent, your tax return information to third parties for purposes other than the preparation and filing of your tax return. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution. You are not required to complete this form. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year.

In order to process your return we must disclose all of your 2018 tax return information to Tax Group Pros, LLC that we utilize in order to provide certain services.

If you will allow us to disclose your 2018 tax return information to Tax Group Pros, for this purpose, sign and date your consent to the disclosure of your tax return information.

- By signing below, you (including each of you if there is more than one taxpayer) authorize us to disclose to Tax Group Pros all of your 2018 tax return information. If you are not willing to authorize us to share your tax information with the other firms, you can still choose to have your tax return prepared and filed by us for a fee.

Printed Name of Taxpayer

Taxpayer Signature:

Date:

Printed Name of Joint Taxpayer

Joint Taxpayer Signature:

Date:

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at **1-800-366-4484**, or by e-mail at ***complaints@tigta.treas.gov*** .

## Consent to Use Of Tax Return Information

### Tax Group Pros ("we," "us" and "our")

Federal law requires this consent form be provided to you ("you" refers to each taxpayer, if more than one). Unless authorized by law, we cannot use, without your consent, your tax return information for purposes other than the preparation and filing of your tax return.

You are not required to complete this form. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year.

If you do not consent, then you may still have your tax return prepared and electronically filed by us for a fee.

For your convenience, we have entered into arrangements with a bank to provide qualifying taxpayers with the opportunity to apply for a Refund Anticipation Loan (RAL), or a Preferred Electronic Refund Check (PERC) or an Electronic Refund Deposit (ERD). To determine whether these products may be available to you, we will need to use your tax return information by analyzing it and calculating the amount of your anticipated refund.

If you would like us to use your tax return information to determine whether these products may be available to you while we are preparing your return, please sign and date this consent to the use of your tax return information.

By signing below, you (including each of you if there is more than one taxpayer) authorize us to use the information you provide to us during the preparation of your 2018 tax return to determine whether to present you with the opportunity to apply for these products and services.

Printed Name of Taxpayer

Taxpayer Signature:

Date:

Printed Name of Joint Taxpayer

Joint Taxpayer Signature:

Date:

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at **1-800-366-4484**, or by email at **[complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov)**.