



Tax Season 2024

Thank you for choosing Tax Mavericks to help you with your tax preparation needs. Attached, please find a form to expedite the completion of your return. We aim to provide you with excellent, accurate and timely service. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

In these trying times, we know that your safety is of utmost importance. Therefore, we will conduct all business via zoom, phone call, email or text.

We will prepare your 2023 federal and state income tax returns. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. An intake form is enclosed to help you collect the data required for your return. The intake form will help avoid overlooking important information as well as contribute to the efficient preparation of your returns.

We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations or other irregularities. We will inform you of any material errors or inconsistencies we may discover. Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

Our fee is based on the schedule posted on our website plus any out-of-pocket expenses which will be discussed with you prior to our engagement. Once we receive your information, we will send over a quote to confirm pricing. Invoices are due and payable upon presentation of draft return. Returns will not be filed until full payment is received.

While we prefer that all forms are sent to us electronically via our secure portal, should you choose to mail us your original forms, we will return them at the end of this engagement. Store these records, along with all supporting documents, in a secure location. We retain copies of your records and our work papers from your engagement for up to seven years, after which these documents will be destroyed. You will have access to your client portal for as long as you remain one of our clients.

If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them. Our engagement to prepare your 2023 tax returns will conclude with the delivery of the completed returns to you, or with e-filed returns, with your signature and our subsequent submittal of your tax return.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign the enclosed copy of this letter in the space indicated and return it to us, along with the intake form electronically. If you are a new client, please forward a copy of your previous year's federal and state return as well.

Thank you for allowing us to assist you in your tax preparation and accounting needs. Please don't hesitate to reach out if you have any questions!

With Gratitude and Appreciation,

Cara R. Bermejo
Cara R. Bermejo
President & CEO
Tax Mavericks, LLC

Accepted By: (Both spouses must sign for preparation of joint returns)

Taxpayer Signature

Spouse Signature

Taxpayer Printed Name

Spouse Printed Name

Date





CLIENT INFORMATION

FULL NAME AS SHOWN ON SS CARD: _____ DOB: _____ SSN: _____
ID TYPE: _____ ID #: _____ ISSUING STATE: _____ DATE ISSUED: _____ EXP DATE: _____
FILING STATUS: _____ OCCUPATION: _____ ACTIVE/RETIRED MILITARY: _____
STREET ADDRESS: _____ CITY, STATE, ZIP: _____
EMAIL ADDRESS: _____ CELL: _____ ALT NUMBER: _____ METHOD OF CONTACT: _____
SPOUSE NAME AS SHOWN ON SS CARD: _____ DOB: _____ SSN: _____
ID TYPE: _____ ID #: _____ ISSUING STATE: _____ DATE ISSUED: _____ EXP DATE: _____
OCCUPATION: _____ ACTIVE/RETIRED MILITARY: _____
EMAIL ADDRESS: _____ CELL: _____ ALT NUMBER: _____ METHOD OF CONTACT: _____
HOW WERE YOU REFERRED TO OUR COMPANY: _____

DEPENDENT INFORMATION

NAME AS SHOWN ON SS CARD: _____ DOB: _____ SSN: _____
RELATIONSHIP TO TAXPAYER: _____ MONTHS IN HOME: _____ SCHOOL NAME: _____
NAME AS SHOWN ON SS CARD: _____ DOB: _____ SSN: _____
RELATIONSHIP TO TAXPAYER: _____ MONTHS IN HOME: _____ SCHOOL NAME: _____
NAME AS SHOWN ON SS CARD: _____ DOB: _____ SSN: _____
RELATIONSHIP TO TAXPAYER: _____ MONTHS IN HOME: _____ SCHOOL NAME: _____

BANK INFORMATION

IF YOU ARE RECEIVING A REFUND, HOW WOULD YOU LIKE TO RECEIVE PAYMENT: _____ DIRECT DEPOSIT _____ CHECK MAILED
IF YOU HAVE AN AMOUNT DUE, HOW WOULD YOU LIKE TO SETTLE PAYMENT: _____ PAY FROM ACCOUNT _____ MAIL CHECK/PAY ONLINE

PLEASE FILL OUT THE INFORMATION BELOW:

BANK NAME: _____ NAME ON ACCOUNT: _____
ROUTING NUMBER: _____ ACCOUNT NUMBER: _____

ACKNOWLEDGEMENT

ALL INFORMATION GIVEN ON THIS FORM IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE. I UNDERSTAND THAT I NEED TO PROVIDE A COPY OF MY DRIVER'S LICENSE AND SOCIAL SECURITY CARD, ALONG WITH MY PREVIOUS YEAR'S TAX RETURN (NEW CLIENTS) IN ORDER FOR TAX MAVERICKS TO BEGIN PREPARATION. FURTHERMORE, I UNDERSTAND THAT SHOULD I CHOOSE NOT TO FILE MY RETURN THROUGH TAX MAVERICKS, A CONSULTATION FEE OF \$100 WILL BE ASSESSED.

SIGNATURE SPOUSE SIGNATURE DATE

