



## Tax Season 2025

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.

We will prepare your 2024 federal and state business tax returns. We will depend on you to provide the information we need to prepare complete and accurate returns. Please forward your year-end Balance Sheet and Profit and Loss Statements along with the other required documents listed on the intake form. 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. The due dates to turn in paperwork is as follows:

- **February 10, 2025** to file and pay for Business Tax Extensions
- **February 10, 2025** to turn in all final P&Ls and Balance Sheets to meet the March 15, 2025 deadline.
- **February 28, 2025** to return e-file authorization and signature pages.
- **July 31, 2025** to turn in final P&Ls and and Balance Sheets to meet the September 15, 2025 deadline

.We will perform accounting services only as needed to prepare your tax returns and these services will be billed prior to beginning your business 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 complexity of your return beginning with the base fee listed on our website plus any out-of-pocket expenses which will be discussed with you prior to our engagement. Invoices are due and payable prior to commencement of your returns.


While we prefer that all forms are sent to us electronically via PDF through our secure client 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.

If you have not selected to e-file your returns with our office, you will be solely responsible for filing the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them. Our engagement to prepare your 2024 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 electronically, along with the intake form. 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  
Owner

**Accepted By:**

\_\_\_\_\_  
Owner Signature

\_\_\_\_\_  
Owner Printed Name

\_\_\_\_\_  
Date



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## CLIENT INFORMATION

FULL NAME AS SHOWN ON SSN: \_\_\_\_\_ SSN: \_\_\_\_\_

DOB: \_\_\_\_\_ RELATIONSHIP TO BUSINESS: \_\_\_\_\_

ID TYPE: \_\_\_\_\_ ID #: \_\_\_\_\_ ISS STATE: \_\_\_\_\_ ISS DATE: \_\_\_\_\_ EXP DATE: \_\_\_\_\_

STREET ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP CODE: \_\_\_\_\_

CELL PHONE: \_\_\_\_\_ WORK PHONE: \_\_\_\_\_ HOME PHONE: \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_ PREFERRED METHOD OF CONTACT: \_\_\_\_\_

## BUSINESS INFORMATION

BUSINESS ENTITY NAME: \_\_\_\_\_

FEIN: \_\_\_\_\_ SEC OF STATE #: \_\_\_\_\_ DATE FORMED: \_\_\_\_\_

BUSINESS ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP CODE: \_\_\_\_\_

TYPE OF COMPANY: \_\_\_\_\_ TAX ELECTION: \_\_\_\_\_

## REQUIRED DOCUMENTS

☐ Articles of Incorporation

☐ Operating Agreement

☐ SS4 (documentation of FEIN)

☐ YE Balance Sheets

☐ YE Profit & Loss Statements

☐ Prior Year Returns (new clients)

## ACKNOWLEDGEMENT

ALL INFORMATION GIVEN ON THIS FORM IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE, INCLUDING BUSINESS FORMATION PAPERWORK AND PROFIT & LOSS STATEMENTS AND BALANCE SHEETS. FURTHERMORE, I UNDERSTAND THAT SHOULD I CHOOSE NOT TO FILE MY RETURN THROUGH TAX MAVERICKS, A CONSULTATION FEE OF \$500 WILL BE ASSESSED.

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
DATE

