



Phone: 714.845.9758  
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Dear Client:

Thank you for selecting me to assist you with your tax affairs. This letter confirms the terms of my engagement with you and the nature and extent of services I will provide.

I will prepare your federal and all state income tax returns you request using information you provide to me. I may ask for clarification of some items, but I will not audit or otherwise verify the data you submit. I have enclosed an "Organizer" to help you gather the information required for a complete return. It will help you avoid overlooking important information and contribute to efficient preparation of your returns.

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

It is your responsibility to provide information required for preparation of complete and accurate returns. Keep all documents, canceled checks, and other data that support your reported income and deductions. They may be necessary to prove accuracy and completeness of the returns to a taxing authority. You are responsible for the returns, so you should review them carefully before you sign them. My work will not include any procedures to discover defalcations or other irregularities. The only accounting or analysis work I will do is that which is necessary for preparation of your income tax returns.

I must use my judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. In order to avoid penalties, I will apply the "more likely than not" reliance standard to resolve such issues. You agree to honor my decisions regarding the need to make protective disclosures in your returns.

Penalties as much as \$100,000 can be imposed on you for failing to disclose participation in "reportable transactions," that is, certain arrangements the IRS has identified as potentially abusive. I will insist that all such transactions be properly disclosed. The law also imposes penalties when taxpayers understate their tax liability. If you have concerns about such penalties, please call me. Your returns may be selected for audit by a taxing authority. Any proposed adjustments are subject to appeal.

My fee for preparation of your tax returns will be based on the forms prepared. All invoices are due and payable upon presentation. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (30) days.

I will retain copies of records you supplied to me along with my work papers for your engagement for a period of seven years. After seven years, my work papers and engagement files will be destroyed. All of your original records will be returned to you at the end of this engagement. You should keep the original records in secure storage.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign on the last page of the tax organizer in the space indicated and return to me.

I appreciate your confidence in me. Please call if you have questions.

Sincerely,

Ryan Letterman  
ZUL Tax Services



Life Events

Yes \_\_\_ No \_\_\_ If you are due a refund, would you like a direct deposit?

Routing Number

Accounting Number

Yes \_\_\_ No \_\_\_ If you have a balance due, would you like a direct debit?

Routing Number

Accounting Number

During last year did you (or your spouse if filing a joint return):

Yes \_\_\_ No \_\_\_ Buy a brand new vehicle? If yes, date of purchase: \_\_\_\_\_

Yes \_\_\_ No \_\_\_ Buy a home? If yes, closing date: \_\_\_\_\_

Yes \_\_\_ No \_\_\_ Have a foreclosure or did the bank cancel any part of your mortgage loan?

Yes \_\_\_ No \_\_\_ Purchase and install energy efficient home items? (such as windows, furnace, insulation, etc.)

Yes \_\_\_ No \_\_\_ Live in an area that was affected by a natural disaster? If yes, where? \_\_\_\_\_

Yes \_\_\_ No \_\_\_ Pay college tuition for yourself, your spouse, or your dependents?

Yes \_\_\_ No \_\_\_ Have any student loans?

Yes \_\_\_ No \_\_\_ Make estimated tax payments last year? If yes, amount: \_\_\_\_\_

Income

During last year did you (or your spouse if filing a joint return) receive:

Yes \_\_\_ No \_\_\_ Wages or salary

Yes \_\_\_ No \_\_\_ Tip income

Yes \_\_\_ No \_\_\_ Scholarships

Yes \_\_\_ No \_\_\_ Interest/dividends (from checking or savings accounts, bonds, CDs, brokerage accounts, etc.)

Yes \_\_\_ No \_\_\_ State tax refund: If yes, did you itemize your deductions last year? \_\_\_ Yes \_\_\_ No

Yes \_\_\_ No \_\_\_ Self-employment income (such as earnings from contract labor, small business, hobby, etc.)

Yes \_\_\_ No \_\_\_ Alimony income

Yes \_\_\_ No \_\_\_ Proceeds (or loss) from the sale of stocks, bonds or real estate (including your home)

Yes \_\_\_ No \_\_\_ Disability income

Yes \_\_\_ No \_\_\_ Pensions, annuities, and/or IRA distributions

Yes \_\_\_ No \_\_\_ Social security or railroad retirement benefits

Yes \_\_\_ No \_\_\_ Income from rental property

Yes \_\_\_ No \_\_\_ Other income: (gambling, lottery, prizes, awards, jury duty, etc.). Identify: \_\_\_\_\_

Expenses

During last year did you (or your spouse if filing a joint return) pay:

Yes \_\_\_ No \_\_\_ Alimony: If yes, what is the recipient's SSN? \_\_\_\_\_

Yes \_\_\_ No \_\_\_ Contributions to IRA, 401(k), or other retirement account, including employer retirement account

Yes \_\_\_ No \_\_\_ Educational expenses (such as a computer, books, etc.)

Yes \_\_\_ No \_\_\_ Medical expenses

Yes \_\_\_ No \_\_\_ Home mortgage interest

Yes \_\_\_ No \_\_\_ Real-estate taxes for your home

Yes \_\_\_ No \_\_\_ Charitable contributions

Yes \_\_\_ No \_\_\_ Child/dependent care expenses that allowed you and your spouse to work or to look for work

I have examined this tax organizer and accompanying documentation, and to the best of my knowledge and belief, they are true, correct, and complete. I have included all the documentation necessary to prepare a true and complete federal, state, and local tax return. I agree to all terms of the engagement letter included with this organizer.

Your Signature

Date

Spouse's Signature

Date

Both husband and wife must sign for preparation of joint returns.