

Phone: 714.845.9758

Email: info@zultaxservices.com

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

- Please complete this questionnaire and email it to the address listed above.
- If we did not prepare your prior year returns, enclose a copy your prior year federal and state return.
- If you answer "yes" to any questions on Page 2, please include documentation to properly support and explain (e.g., W-2, K-1, 1098, 1099, list of educational expenses, home closing statement, etc.)
- Please attach any additional documentation needed to fully prepare you federal and state tax returns.

Personal Information								
Last Name	First Name		Middle Initial		Date of Birth		Social Security Nu	umber
Decupation		Email Address	Email Address				Contact Phone Number	
					Are yo	u a US citizen?	Yes	No
Street Address			-	Are you legally blind? Yes_ No		No		
			_	Are you tota	ally and permane	ently disabled?	Yes_	No
City	State	Zip	_					
			Can anyone claim you or your spouse on their tax return?		eir tax return?	Yes_	No	
State of Residence								
Spouse's Information (If Applicable)								
Last Name First Name		Middle Initial Date of Birth			Social Security Number			
Occupation			Email Address				Contact Phone Number	
					Are yo	u a US citizen?	Yes_	No
					Are you	ı legally blind?	Yes_	No
				Are you tota	ally and permane	ently disabled?	Yes_	No
	Can anyone claim you or your spouse on their tax return?				eir tax return?	Yes No		
		Fa	mily and Dep	endent Info	rmation			
As of December	31, last year your ma	arital status	was:					
Single								
Married: Did	you live with your sp	pouse durin	g any part of t	he last six n	nonths of last	year? Yes	No	
Divorced or Legally Separated: Date of final decree or separate maintenance agreement:								
Widowed: Da	ate of spouse's death	n:						
List the name of	everyone below who	o lived in yo	ur home and	outside you		ou supported	during the	year.
			Relationship(# of	US citizen or resident of	Married as of		Received more
Full Name			e.g., son,	Months	US, Canada,	12/31 last	Full-time	than \$3,650 in
(Do not include yo	u or your spouse's	Date of	mother,	lived in	or Mexico?	year?	Student?	income?
name)		Birth	sister)	your home	(yes/no)	(yes/no)	(yes/no)	(yes/no)
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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 ye	ar did you (or your spouse if filing a joint return):								
Yes No	Buy a brand new vehicle? If yes, date of purchase:								
	es 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.)									
	es No Live in an area that was affected by a natural disaster? If yes, where?								
	es 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									
,	ar 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? YesNo									
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, hands or real estate (including your hame)									
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									
	Income from rental property								
	o Other income: (gambling, lottery, prizes, awards, jury duty, etc.). Identify:								
During last ve	ar did you (or your spouse if filing a joint return) pay:								
	Yes No Alimony: If yes, what is the recipient's SSN?								
	Contributions to IRA, 401(k), or other retirement account, including employer retirement account								
	Educational expenses (such as a computer, books, etc.)								
	Medical expenses								
	_ 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.			Both husband and wife must						
	Your Signature	Date	sign for preparation of joint						
	Spouse's Signature	Date	_ returns.						