

## ABOUT US

Wood Accounting Services LLC has provided quality service to the public for over 25 years. Lloyd, your trusted accountant, is an Enrolled Agent with the US Treasury. A Certified Tax Professional through the American Institute of Tax Studies. Lloyd also maintains a Pennsylvania Life, Annuities, Accident, and Health license with the Pennsylvania Insurance Department. He graduated from Saint Leo University Cum Laude with bachelor's degrees in Accounting and Business Administration. Prior to starting his own practice, he worked for American Express as a financial planner, obtaining Series 7 General Securities Registered Representative License, as well as, a Series 65 Uniform Investment Advisor License. To maintain his licenses, he completes numerous hours of continuing education each year. He proudly serves Western Pennsylvania, but is licensed to prepare taxes nationwide.

The members of our educated and experienced staff genuinely want to help with all your financial matters. Our mission is to provide a smooth and simple process. All accounts are handled with the same sense of importance. You will find this brochure provides information to help you understand the process. Please feel free to talk to our staff members about our services. Our goal is to maintain long term relationships by working closely with our client's individual needs. We thank you for choosing us for your tax needs.

Lloyd A Wood - Owner  
Tami L. Wood- Office Assistant  
Chanell R. Daniocek- Accountant  
Amanda J. Showman- Bookkeeping Specialist  
Micki M. Richter- Accounting Clerk  
Josette Yagle- Accounting Clerk  
Sylvia Lewis- Accounting Clerk  
Joretta Myers- Accounting Clerk  
Carmen Renzi- Accounting Clerk



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## Tax Engagement and Policies



## TAX ENGAGEMENT LETTER

Thank you for selecting Wood Accounting Services LLC to assist you with preparation of your tax returns. When you submit your tax information to us, you acknowledge and agree to the following terms and conditions for our services.

Your returns will be prepared from the information you provide. We may ask for clarification of some items but we will not audit or verify your data. You are responsible for the accuracy of information used to prepare the returns. Our responsibility is to prepare the returns in accordance with applicable tax laws.

Those laws impose penalties on you, and possibly us, for inaccurate reporting of information, and failure to maintain records required by law. Some items may require a special disclosure to protect you and us from penalties. We will consult with you about any special disclosures we believe necessary.

We may notice opportunities for tax savings that require changes in the way you handle some transactions; we will share any ideas we have with you. The preparation of your tax return does not include tax planning services; if additional services are required, we will discuss that with you.

We will assist you if your return is selected for examination by federal, state, or local tax agencies.

Our fees for preparing your return are based on the time required at our standard rates for such services. Payment is due when invoice is submitted to you.

We appreciate the opportunity to serve you in this important work. If you have questions about the contents of the notice, please notify us.

Thank you,  
Lloyd A Wood



## SERVICES PROVIDED

### Tax Preparation

Personal  
Business  
Non-Profit  
Inheritance

### Business Formation

### IRS / PA Representation

### Financial Planning

### Retirement Planning

Annuities

401K rollovers

### Estate Planning

### Insurance Planning

*For additional information about  
these services please call our office.*

Password \_\_\_\_\_

## ELECTRONIC COMMUNICATION CONSENT FORM

In previous years we have received requests to send tax returns to third parties. IRS regulations prevent us from sending tax returns without prior authorization. We could only provide you with a copy of the return or have you complete Form 7216 (Third Party Disclosure Consent), which allows us to send the return to the third party. We now offer a way to send your returns to you through email.

The Electronic Communication Consent Form is designed to collect information from you, which can allow us to communicate and handle requests for your tax return. The form has two sections. The first section is used to send correspondence and the tax return to your provided email address. The second section is used to provide you cell phone number which can allow us to send limited messages to you. This form has two purposes; one purpose is to communicate with you through electronic measures and the second purpose is to allow us to send copies of your tax material and returns to you.

The email option is used to send a PDF of your tax return directly to your provided email address. You then can send the return to anyone that needs a copy. The return normally will be sent without file encryption. You may request the file to be encrypted. This password would need to be provided to anyone requesting the return.

The texting option is used to communicate the status of your tax return. If you like we can send information about your refund. To grant us this option we will need your cell phone number and provider. If you decide to use the texting option, we can only send limited information. Complex questions should still be discussed over the telephone or in person. You must respond to any communications with the password you provided on the form.