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Welcome

Thank you for choosing Howard Tax Prep to provide for your tax filing needs this year. We look forward to meeting you at your scheduled appointment time, so that we may give assess your tax situation, and provide you with the best solutions for your situation. Once you become one of our clients we take great care to continue that relationship, and we view this first meeting as only the beginning of our service to you.

This letter comes with several forms. Please read, complete and bring them along to your appointment. Briefly, the purpose of the forms:

ESTIMATED FEE DISCLOSURE

This form is a required disclosure statement stating what your estimated tax preparation fee cost will be. Please do not become alarmed by some of the wording. We will answer any of your concerns at the appointment.

CLIENT ENGAGEMENT LETTER

This form is a required disclosure statement stating what our responsibility is with your tax information, and what yours is. Please do not become alarmed by some of the wording. We will answer any of your concerns at the appointment.

PAYMENT OF FEES AGREEMENT

This form confirms that payment is due at time of service, and late fees & collection procedures if fees are not paid on time. Cash/Credit card payment clients can disregard this form.

CONSENT TO USE TAX RETURN INFORMATION

This form is required by Federal law. Unless authorized by Federal law, we cannot use, without your consent your tax return information for purposes other than the preparation and filing of your tax return. If you would like to hear about tax saving products, insurance, refund advances, etc. we need this form signed.

HEALTHCARE DISCLAIMER

This form is used to confirm what type of health insurance your family had, and for how long.

HEAD OF HOUSEHOLD DISCLOSURE

This form will allow us to assess your tax situation, and enter your information into our systems.

EARNED INCOME DUE DILIGENCE

This disclosure form list exactly what is needed to claim the Earned Income Credit.

In addition, please bring along a copy of your last year's return. It may contain some information that we will need to bring forward to this year's return. We will also perform a review of that return for you at no additional cost.

Thanking you again,

Howard Tax Prep.



HOWARD TAX PREP ESTIMATED FEE DISCLOSURE

Tax Preparation Fees:

(Taxpayer Initial)

Tax preparation fees are determined and charged based upon the complexity of the tax return. You will have the opportunity to review all fees associated with your tax return. Minimum income tax preparation fees:

Federal Forms	<u>1040EZ*</u>	<u>1040A</u>	<u>1040</u>	<u>Schedule C Self Employed</u>
Federal	\$150	\$225	\$275	\$500
State	\$35	\$35	\$35	\$75

Miscellaneous fees that may apply:

(Taxpayer Initial)

Technology Fee --**\$20.00**

E-file Fee --**\$20.00**

Quickbooks Cleanup --\$180.00 per hour

Refund Transfer Fee --**\$29.95**

Data Entry W2, 1099, 1098, ETC-- **\$7.00 per page after initial 2 FREE ENTRIES**

Additional book keeping (calculating logs, receipts, etc.)-- **\$65.00 PER HOUR** min billed 1/2 hour @ \$35.00

Research Income/Reconstruction Fee-- **\$65.00 PER HOUR** min billed 1/2 hour @ **\$40.00**

State Additional Returns After home state processing-- **\$30 personal, \$70 business**

Written Estimate:

(Taxpayer Initial)

Based upon a review of the documentation and information provided in our introductory conversation, we estimate the total charge for tax preparation service to be: FORM _____ with a fee of _____ for your base charge, and _____ in additional charges for _____. Your actual charge will be determined during our full interview & full processing of your return.

Refund Timing Estimate:

(Taxpayer Initial)

According to the IRS, 9 out of 10 refunds will be issued in less than 21 days.

My tax preparer has verbally reviewed the above disclosures with me.

Taxpayer Signature

Date

Taxpayer Signature

Date

I have verbally reviewed the above disclosures with the taxpayer.

Tax Preparer Signature

Date



INCOME TAX PREPARATION DISCLOSURE FORM

ESTIMATED CHARGES FOR THE FOLLOWING RETURNS ARE:

TAX SITUATION	FEDERAL	STATE
1040EZ Simple Return	\$ 150	\$ 35
1040A Standard Deduction	\$ 225	\$ 35
1040A Itemized Deduction	\$ 225	\$ 35
1040 Complex	\$ 275 + Per Form Cost	\$ 35
Self Employed Schedule C Filers	\$ 500	\$ 75
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$

ADDITIONAL CHARGES APPLY FOR:

Additional book keeping (calculating logs, receipts, Min 1/2 hour @ \$40.00	\$65.00 PER HOUR
Research Income/Reconstruction Fee Minimum 1/2 hour @ \$40.00	\$ 65.00 PER HOUR
State Additional Returns After home state processing	\$ 30.00 personal, \$70 business
E-File Fee	\$ 20.00
Technology Fee	\$ 20.00
Quickbooks Cleanup	\$ 180.00 PER HOUR
Refund Transfer Fee	\$ 29.95
Data Entry W-2, 1099, 1098 Entry After first 2 FREE!	\$ 7.00
.....	\$

Charges may vary in accordance with the standard schedule of charges depending upon such factors as any necessary additional forms (including forms needed for itemizing deductions, sale of property or business ownership). **You will receive an estimate of the cost for the tax preparation services you have selected prior to entering into a contract.**

- If you file a paper tax return by U.S. Mail and elect to receive your tax refund through the U.S. Mail, you can expect your refund 6-8 WEEKS.
- If you file your tax return electronically and elect to receive your tax refund through the U.S. Mail, you can expect your refund 7-28 DAYS.
- If you file your tax return electronically and elect to receive your tax refund to your personal bank account, you can expect your refund 7-21 DAYS.

Client Signature Date

I certify that I have presented and verbally reviewed all required disclosures with the consumer:

Tax Preparer Signature Date



HOWARD TAX PREP

ENGAGEMENT OF SERVICES AGREEMENT

Preparer Trudy Howard

Client Name _____ Date _____

This letter is to confirm our understanding of the terms and objectives of our engagement and the nature and limitations of the services we will provide.

We will prepare your Federal Income tax return and income tax returns for the **states of** _____, with supporting schedules, and perform related research as considered necessary (herein after known collectively as the “returns”).

This engagement pertains only to the **tax year** _____, and our responsibilities do not include preparation of any other tax returns that may be due to any taxing authority. A similar letter/contract will be issued and signed for any other tax years wherein you choose to engage this firm. Our engagement will be complete upon the delivery of the completed returns to you. Thereafter, unless the process of electronic filing is appropriate, you will be solely responsible to file the returns with the appropriate taxing authorities.

We will furnish you with our tax packet to guide you in gathering and understanding the necessary information required for your tax preparation. Your thorough completion and use of these forms provide for the most accurate return and assist us in keeping our fees to a minimum.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. We will not audit or otherwise verify the data you submit. Accordingly, our engagement cannot be relied upon to disclose errors, fraud, or other illegal acts that may exist in the information you have provided.

In addition to the information you have placed in the packet, or other papers you may provide, you further acknowledge that to the best of your knowledge and belief during the interview/preparation process you have provided accurate, complete and full disclosure in your answers to any and all questions regarding income, expenses, deductions and exemptions in an effort to ensure that your return is prepared accurately.

To the extent we render any accounting and/or bookkeeping assistance, it will be limited to those tasks we deem necessary for the preparation of the returns and may lead to additional costs. Therefore, your commitment is essential to our ability to complete this engagement. Specifically, we must receive comprehensive information from which to prepare your returns within a reasonable period of time.

If, during our work, we discover information that affects your prior-year tax returns, we will make you aware of the facts. However, we cannot be responsible for identifying all items that may affect prior-year returns. If you become aware of such information during the year, please contact us to discuss the best resolution of the issue.

Your returns may be selected for review by one or more taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination(s), we will be available upon your written request to represent you during the examination and/or during any appeal for an additional fee.

You should retain all the documents, receipts, records, canceled checks and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. **You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them.**

Taxpayer: _____ Date: _____

Spouse: _____ Date: _____



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When it comes to cost, no one like surprises. To eliminate the element of surprise, Howard Tax Prep publishes our rates online, and we provide every client with a written estimate before any works begin. While pricing is important, we believe that it is equally important for us to communicate the client/tax preparer relationship and expectations. Listed below please find our list of client expectations, and tax preparer expectations.

What you can expect from us:

Timely filings.	(1) Written notification & request for documents.
Qualified & Credentialed Tax Preparers.	Taxes computed in compliance with tax code.
Representation in front of the IRS.	Uncovering of potential deductions and credits <u>(this does not include TAX STRATEGIES UNLESS CLIENT PURCHASES TAX PLANNING PACKET).</u>
Accurate tax returns based upon the information provided to us.	Notification of potential tax liabilities.
Clearly communicated services fees.	Reviewing of financial records such as income statements.
Explanation of your tax return.	
Preparers that sign your return.	

What we expect of our clients:

Honest Communication.	Notification of any past due state/county/federal debts.
Providing of documents in a timely fashion.	Processing of own bookkeeping unless we are hired to provide bookkeeping services.
Full disclosure regarding dependents, health insurance, business expenses, business income.	Calculation and Categorization of all expenses, as we do not add up receipts, reports, bank statements, etc.
Prompt payment of fees. No exceptions will be made for seized/intercepted refunds.	

CLIENT NAME: _____ SIGNATURE: _____



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HOWARD TAX PREP Fee Agreement & Consent To Use Tax Return Information

Howard Tax Prep offers many types of services and taxes for individuals and businesses. Services provided by have fees related to them and the fees are subject to change at any time. You have requested that we prepare your tax returns and they will be prepared based on the information provided to us. We ask for clarification of some items, but we will not audit or otherwise verify the data you submit. You are responsible for providing us complete and correct information for your return. **You are also responsible for all information reported on the tax return** so you should review the return carefully before signing them. We return all original documents and a complete copy of the return.

Tax Preparation and Other Services: Payment for taxes/services is due when work is completed by Howard Tax Prep regardless if an extension is filed. Payment is also due when work has been done, but has not been completed, through no fault of Howard Tax Prep, and/or we have not had contact with you for 60 days. **If you want us to try to take our fees from your refund, there is no guarantee that we will be able to take any/all of the fees from the refund. If we are unable to take all or part of our fees then you are responsible for paying the balance.**

Tax information: Howard Tax Prep and its contractors also offer other services including financial and insurance services. When we prepare your taxes, we look to see if there are any ways you can get more money back or owe less. We do not try and sell you anything. Because some of the things involve IRAs, IRS prevents us from telling you these tax saving tips without your permission. **If you want us to tell you how you can save money on your taxes initial to the left.**

Late Fees: After 30 days, payment is past due and is subject to a \$35.00 late fee. The entire balance includes all related late & collection fees as well as any other fees incurred. Howard Tax Prep charges a 9% interest rate on past invoices compounded monthly. **Checks returned for non-sufficient funds are subject to a \$35.00 fee. If court action is required, court fees, attorney fees, and a \$75.00 collection fee will be added to the total amount owed to Howard Tax Prep.**

Responsible Parties: By signing below you are agreeing to payment of taxes/services. If you choose to file Married Filing Separately and have brought in information for both returns, then whosoever signs this form below is responsible for payment of both returns. You are also signing that you are authorized to request taxes/services on behalf of the other party.

By signing this form, you acknowledge that you have read and understand the fee agreement. You are aware that Howard Tax Prep charges fees for services rendered and that you agree to pay these fees. We cannot guarantee which preparer will work on your taxes; the first available preparer will prepare them and the preparer is subject to change at any time. Tax returns are sent to the IRS through an IRS authorized third party. This form is good until April 15th of the year following the date on this form. You must be at least 18 years old to sign this agreement.

Taxpayer
Signature: _____ Date: _____

Spouse
Signature: _____ Date: _____