

A ACCOUNTING & TAX SERVICE

2213 Velp Avenue ~ Green Bay, WI 54303
(920) 434-6055

POLICY FORM FOR INCOME TAX PREPARATION

Tax Return Preparation

- We will prepare your 2022 Form 1040, U.S. Income Tax Return, and state tax return(s) based on information you provide. Services for preparation of your return does not include auditing or verification of information provided by you. In the event of an audit, you will be responsible for verifying the items reported.
- The tax return preparation fee does not include bookkeeping. Additional fees apply for these services.
- It is important to store your supporting documents and copies of your tax returns in a secure place for at least seven years. You may be assessed a fee if you request a copy from our office in the future.
- Taxes are completed in the order they are received. During peak times, taxes may take as long as two or three weeks for completion. We will contact you when they are completed and ready for pick-up.

Taxpayer Responsibilities

- You agree to provide us all accurate income and deductible expense information with supporting written records. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the returns carefully for errors or omissions before signing to ensure the information is correct.
- Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required for the preparation of late returns. There is a \$35.00 charge for any returned checks. We accept cash, check, debit card, Visa, MasterCard, American Express, and Discover.
- Once taxes leave our office, whether e-filed or mailed, we have no control or responsibility over how long it takes for you to receive your refund. In addition, it is your responsibility, if money is owed to federal or state, to send payment by the due date. You may check your return online at:
www.irs.gov/refunds and www.dor.state.wi.us
- All completed tax returns should be picked up within two weeks (14 days) of notification. If not picked up within 30 days of notification, there will be an interest charge of 1.5% added per month on the unpaid balance.
- Our office may close during inclement weather. Please call our office prior to traveling.

Signatures. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities and that you understand our responsibilities in preparing your tax returns as explained above. For a joint return, both taxpayers must sign.

Taxpayer

Spouse

Date

Privacy Policy. The nature of our work requires us to collect certain nonpublic personal information about you from various sources. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our company has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our company who need to know in order to provide you with services. We will not disclose your personal information to any third party. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access. Please contact us with any questions regarding our privacy policy.