

Link Sync Wealth

Phone: 470-641-5618
www.linksyncwealth.com

Client Information Form

Taxpayer

Full Name _____
Occupation _____
SSN _____
Date of Birth _____
Daytime No. _____
Mobile No. _____
Fax No. _____
Email _____

Spouse

Full Name _____
Occupation _____
SSN _____
Date of Birth _____
Daytime No. _____
Mobile No. _____
Fax No. _____
Email _____

Current Address _____ Apt # _____ Have you moved since filing
City _____ State _____ your last return? _____
Zip _____ Date of Move _____
COUNTY _____
Tax Year / Type of Service _____
Tax Consultant _____

Dependents

Legal Name	Birthdate	SSN#

Link Sync Wealth

Name: _____ Date: _____

Dear Client:

Thank you for selecting LSW Financial Services, LLC for your tax preparation needs and related work. This letter is to confirm and specify the terms of our engagement with you, which shall also apply to any additional services we provide to you. We may, from time to time modify our terms of engagement for future services and will provide a copy of the modified terms of engagement to you at such time.

Services to be Provided

You are engaging us to prepare the tax returns for the calendar year _____ (Please enter) as indicated below. (Please place a checkmark in the box besides the returns you would like us to prepare, specifically listing ALL state and local returns.)

<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

Federal Income Tax Return -- Form 1040

State Income Tax Return(s) (please list states)

Other Tax Returns (Personal Property, etc.)

We are not responsible for returns not on the list. We are under no duty to review the information you provide to determine whether you may have a filing obligation with another state, city or other locality. If we become aware of any other filing requirement, we will tell you of the obligation and may prepare the appropriate returns at your request as separate engagement.

This engagement letter does not cover the preparation of any financial statements, or any other accounting or advisory services which, if we are to provide, will be covered under a separate engagement.

You understand that you are responsible for making all financial records and related information available to us so that we may perform these services and that you are responsible for the accuracy and completeness of the information you supply. This responsibility includes the maintenance of adequate records and related internal controls over financial reporting. Additionally, upon our request, you are responsible for providing us all the documents, receipts, cancelled checks and other records required to substantiate the financial records. We will return to you all of your original records. The work papers and files prepared by us in connection with the performance of this engagement are the property of this firm. You should retain all of these records that form the basis of income and deductions for a minimum of 7 years. 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; therefore, you should review them carefully before you sign them.

Completion of our Worksheets, Client Questionnaire, and other forms requiring specific information in their entirety will assist us in preparing accurate and complete tax returns. In providing this information to us, you represent that the information you are supplying is truthful,

accurate and complete to the best of your knowledge and that you have truthfully disclosed to us all income and other relevant facts affecting the returns. You further represent that you have provided us true, correct and complete information regarding amounts you claimed as tax deductions and have maintained written documentation supporting all amounts, including log books and receipts. We will not audit, and normally we will not verify, any information that you provide.

If a question arises regarding the interpretation of tax law and a conflict exists between the tax authorities' interpretation of the law and other supportable positions, you understand that we will use our professional judgment in resolving the issue.

We are not responsible for disallowed deductions or credits or for the inclusion of additional unreported income including any resulting taxes, penalties or interest. Further, we are not responsible for the payment of any penalties imposed on returns that are late, underpaid, or incorrect. You agree to be responsible for all amount owed to the IRS or to any state revenue department.

Due to new tax regulations requiring preparation of additional forms, your fees may increase from prior years. We will make every effort to advise you of these changes as we evaluate your tax situation.

We are pleased that you are entrusting your work to us, and we will do our best to provide you with prompt, high quality and cost-effective services. To memorialize our engagement agreement, please countersign the enclosed copy of this letter and return the same to us via e-mail.

Sincerely: LSW Services Team

READ, UNDERSTOOD AND AGREED: The terms and conditions of your engagement are accepted.

I/we agree to retain LSW Servives LLC as my/our Tax Preparer. I/we agree to be jointly and severally responsible for the payment of your fees and other charges as set forth in this engagement agreement. I/we agree to review all documents prepared by LSW Services, LLC on my behalf to ensure accuracy prior to submittal to any government agency. LSW Services, LLC is not responsible for providing any of the deductions taken on my tax return(s). I/we have provided this information from my own tax records and I have proof of my deductions and income.



Taxpayer Signature Date

Taxpayer's Printed Name



Spouse Signature Date

Spouse's Printed Name

Company: _____

By: _____
Individual Name, individually and on behalf of Company Name

Title: _____