

Carring Tax Client Data Sheet

TAXPAYER NAME _____ (M/F) SPOUSE NAME _____ (M/F)
 OCCUPATION _____ OCCUPATION _____
 SSN _____ BIRTHDATE _____ SSN _____ BIRTHDATE _____
 ADDRESS _____ APT# _____
 CITY _____ STATE _____ ZIP _____ EMAIL _____
 PHONE (DAY) _____ PHONE (EVE) _____ PHONE (CELL) _____

DEPENDENTS: (List Youngest First) Name (First, Initial and Last Name)	Month, Day & Year of Birth	Dependent's SSN	Relationship to you	Months lived in your home this tax year?

CHECK ALL THAT APPLY

- You and, if applicable, your dependents have medical insurance
- Someone else can claim you as a dependent.
- You and your spouse lived apart during the year. If yes, did you live together at any time after June 30? Yes No
- You paid *estimated* Federal or State taxes last year Federal \$ _____ State \$ _____ State \$ _____
- You or your spouse were a resident of another state or earned income in another state during the last year.
- You purchased a home in 2008 and received the up to \$7,500 First-time Home Buyers credit.
- You were a student, had education expenses, or made student loan payments.

Choose your refund option (one only)

- Bank Product (7 to 21 days Refund. Fee taken from Refund) Paper Return (Fee paid up front)
- Direct Deposit (Fee Paid up front)
- If you choose direct deposit, fee is paid up front and you must provide:
 Checking Saving Routing Number _____ Account Number _____

CIRCLE ALL THAT APPLY

- | | | |
|--|---|--|
| <ul style="list-style-type: none"> • Wage Statement—W-2s • Tips / Other Income • 1099s • Received Interest • Received Dividends • Sold Stock or Bonds • Pension or Retirement Income • IRAs • Received Unemployment • Social Security Income • Alimony (Paid or Received) | <ul style="list-style-type: none"> • Buy or sell a home • Own Rental Property • Sold a business asset • Farm Income • Lottery or Gambling Winnings • Cancellation of Debt • Moving Expenses • Paid qualified education expense • Made student loan payments • Received homebuyer credit in 2008 | <ul style="list-style-type: none"> • Medical Expense • Mortgage Interest • Mortgage Points (i.e. closing points) • Paid real estate taxes • Property Tax • Charity or Religious Contributions • Significant Loss or Theft • Tax Preparation Expenses • Union Dues • Job Related Expenses or Training • Used personal vehicle for work |
|--|---|--|

CHILD CARE INFORMATION

(Note: This information is required for each provider. Use the back of this sheet if more space is needed.)

Provider's Name _____ Provider's SSN/EIN _____
 Providers Address _____ Amount Paid to Provider \$ _____

Once your return is started in our system, and you may want to cancel the return at any time, a cancellation fee of \$45 will be charged after preparation of your tax return is done and refund amount is known, with or without submittal to the IRS / State

I CERTIFY THAT I WOULD LIKE MY TAXES PREPARED ACCORDING TO THE INFORMATION I SUPPLIED ABOVE:

Taxpayer's Signature _____ Date _____
 Spouse's Signature _____ Date _____

Carring Tax Service, LLC.

5920 N. Sam Houston Pkwy. East #110
Humble, TX 77396

STANDARD ENGAGEMENT LETTER FOR TAX SERVICES

This letter is to confirm Our understanding of the terms and objectives of the engagement between Carring Tax Service, LLC (hereinafter referred to as "We", "Us" or "Our") and _____ & _____ (hereinafter referred to as "You" or "Your"), and the nature and limitations of the services We will provide.

We will prepare your individual federal, state, municipal and school district income tax returns from information You furnish to Us. You represent that the information you are supplying to us is accurate and complete to the best of your knowledge and that you have disclosed to us all relevant facts affecting the return(s). We are not auditing or reviewing these tax returns. We will not verify the information you give us; however, we may ask for additional clarification of some information.

You hereby acknowledge, agree and understand that We will not be retaining any supporting documentation for Your tax returns other than documents supporting federal withholding taxes. You understand and agree that document retention is Your sole responsibility and You hereby indemnify and hold Us harmless from any and all claims, including attorney fees, resulting directly or indirectly from the failure to retain any supporting documentation. You understand and acknowledge that failure to provide supporting documentation to the IRS or other taxing authorities when and as requested may result in imposition of additional taxes, penalty and interest and You agree that You will be solely responsible for such items (including any costs of defense) and hereby release Us from any liability whatsoever for failing to retain such documentation. We may make images of the documents You provide to us. By signing this letter and the materials associated with your return prepared by us, you declare that you have provided to us all income and deductible expense information, and that all expenses or other deductions are accurate and that you have all required supporting written records.

Your income tax returns may be selected for examination by various taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal.

You agree to pay the amount of the invoice for services rendered under this engagement letter at the time Your completed income tax returns are delivered to You. No returns shall be delivered without payment. We are not responsible for any late fees, penalties or interest for not providing You your return if payment is not made when the return is prepared.

We appreciate the opportunity to be of service to You. Please sign and date to acknowledge Your agreement with the terms of this engagement.

Accepted by: _____ Date: _____

Spouse: _____