

# INFORMATION SHEET FOR BUSINESS

**OFFICE USE  
ONLY**

Date: \_\_\_\_\_

Initials: \_\_\_\_\_

Assigned to:  
\_\_\_\_\_

## BUSINESS INFORMATION

Business Structure:     C-corp         S-corp         Partnership         Exempt Organization

Name of Company: \_\_\_\_\_

EIN #: \_\_\_\_\_    State ID #: \_\_\_\_\_    Business Activity: \_\_\_\_\_

Company Address: \_\_\_\_\_    City, State, Zip \_\_\_\_\_

Company phone: \_\_\_\_\_    Tax exempt status (if applicable): \_\_\_\_\_

How many shareholder or partners? \_\_\_\_\_    Business start date: \_\_\_\_\_

\*If this is not a new business please include a copy of last year's tax return

## REPRESENTATIVE CONTACT INFORMATION

Name: \_\_\_\_\_    Phone: \_\_\_\_\_

Address: \_\_\_\_\_    City, State Zip \_\_\_\_\_

Email Address: \_\_\_\_\_    Are we preparing your personal return? \_\_\_\_\_

Please list any additional information that your tax preparer should know or any questions you may have:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



# TAX PREPARATION PERMISSION & ENGAGEMENT LETTER

Thank you for selecting The Old Tax House to assist with your tax return preparation. This letter will confirm the arrangements and general scope of services we provide.

**TAX PREPARATION SERVICES:** As requested by you, we will prepare your federal and state income tax returns using information you provide to us. **It is your responsibility to provide information required for preparation of complete and accurate returns, including, but not limited to, the inclusion of ALL TAXABLE INCOME to be reported on these returns.** We may ask for clarification of some items, but we will not audit or otherwise verify the data you submit. We will furnish you with questionnaires and/or worksheets as needed to guide you in gathering the necessary information. Your use of such forms will help keep the cost of our services as low as possible. ***ULTIMATELY, YOU ARE RESPONSIBLE FOR THE RETURNS, REVIEW THEM CAREFULLY BEFORE YOU SIGN THEM.***

Our work will not include any procedures to discover defalcations or other irregularities. The only accounting or analysis work we will do is that which is necessary for preparation of your income tax returns. Without disclosure in the return itself of the specific position taken on a given issue, we must have reasonable belief that it is "more likely than not", that the position will be held to be correct upon examination by taxing authorities. In the event we and/or you are assessed penalties due to our reliance on inaccurate, incomplete, or misleading information you supplied to us (with or without your intent or knowledge), you will indemnify us, defend us and hold us harmless as to those penalties.

All of your original documents will be returned to you at the end of this engagement. We will retain copies of records you supplied to us along with our work papers for your engagement for a period of three years. You should keep all documents, cancelled checks and other data that support your reported income and deductions. They may be necessary to prove accuracy and completeness of the returns to a taxing authority. You should keep all original records in a secure location for a minimum of ten years.

The timeliness of your cooperation is essential in our ability to complete this engagement. Specifically, we must receive information from you in a reasonable period of time prior to the applicable filing deadline. Accordingly, if we do not receive information from you in a timely manner it may be necessary to pursue an extension of the due date of your returns, and we reserve the right to suspend our services or withdraw from this engagement. Re-processing fees may apply for additional information brought to us after returns are complete.

If you file a joint return, because you will each sign the returns, you are each our client. You each acknowledge that there is no expectation of privacy from the other concerning our services and we are at liberty to share with either of you, without the prior consent of the other, any and all documents and other information concerning preparation of your returns. You also acknowledge that unless we are notified otherwise in advance and in writing, we may construe an instruction from either of you to be an instruction on your joint behalf.

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**TAX PREPARATION FEES:** Our fees are based on a price per form/schedule required to complete your return. Additional charges may include: multi-state returns filed, bookkeeping necessary for the preparation of your tax return, tax consultation for estimates, amended tax returns, FAFSA reports, etc. which are identified separately on your invoice. Payment for services is due upon completion of your tax return.

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**OTHER SERVICES:** Bookkeeping, payroll, payroll reports, year-end reports such as W2's and 1099's, business consultation, interim and year-end tax planning. These services are billed separately; you may contact us for our fee schedule.

Although we may verbally discuss tax planning issues with you from time to time, such discussions will not constitute advice upon which we intend for you to rely for any purpose. Rather, any advice upon which we intend for you to rely, and upon which you will rely, will be embodied in a written report or correspondence from us to you, and any such writing will supersede any prior verbal representations between the parties on the issue.

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Occasionally mistakes are made so please forgive us as we are human. ☺ Be courteous and let us know within twelve months if you receive any letters from the government or you believe an error was made. We do correct returns for free and pay any penalties, if we are at fault. However, we are not responsible to pay any taxes owed. The Old Tax House is not responsible for any legal fees. You agree to take no action which is intended, or would reasonably be expected, to harm the Company or its or their reputation, products, services, management or employees or which would reasonably be expected to lead to unwanted or unfavorable publicity to the Company.

**PLEASE REVIEW YOUR RETURNS CAREFULLY BEFORE SIGNING AND FILING THEM. If you have any questions, please ask. Tax Preparation is a partnership. Thank you for choosing us as your partner, we appreciate the opportunity to work with you now and for many years to come.**

The Old Tax House is not responsible for providing any of the deductions taken on my tax return(s). I have provided this information from my own records and I have proof of my deductions and income. I give my permission to The Old Tax House to prepare my tax return(s) and I have read, understand and agree to the terms of this engagement. I have also read the E-file Information below. A copy of our Privacy Policy is available upon request.



### E-FILING – SIMPLE & SAFE

It is mandatory that you sign IRS Form 8879 after we have completed the return. The return will not be electronically filed until The Old Tax House has possession of the signed form.

Your refund may be delayed for reasons such as, but not limited to: Random IRS audit, Earned Income Credit eligibility verification, Incorrect Bank Account/Routing number.

Your refund may be seized or reduced for reasons such as, but not limited to: Unpaid child support, Back taxes owed, Payments in arrears to any Federal or State Agency such as Student Loan Deficiency.

A return may be rejected by the IRS for reasons such as, but not limited to: Social Security Number issues (ie. Name and Number do not match SSA records), Dependent claimed on another tax return, Invalid/Wrong birth date.

\_\_\_\_\_  
Officer or Business Representative

\_\_\_\_\_  
Date