



NEW CLIENT

INFORMATION SHEET _____ TAX YEAR

PLEASE PRINT CLEARLY SO ALL INFORMATION CAN BE EASILY READ

H.O.H.: _____ FILING SINGLE: _____ MARRIED FILING JOINT: _____ MARRIED FILING SEPARATE: _____

HEAD OF HOUSEHOLD

Primary Taxpayer Information:

Last Name: _____

First Name: _____ M.I. _____

SSN or T.I.N. #: _____ - _____ - _____

Birthdate: _____ - _____ - _____

US Citizen: Y _____ N _____

Job title for tax year: _____

E-Mail: _____

Work Phone: _____ Ext: _____

Cell Phone: _____

Home Phone: _____ **Best Contact Phone #:** _____

Street Address: _____ Apt # _____

City: _____ State: _____ Zip: _____

Bank Account Changes: Y _____ N _____ If **YES**, please make changes. Account type: ___Checking ___Savings

Bank Name: _____ Routing #: _____ Account #: _____

Foreign Bank Account/s: Y _____ N _____? Do you have a foreign wallet: Y _____ N _____?

Did you buy &/or sell virtual currency in **2023**: Y _____ N _____?

Change of Dependents: Y _____ N _____ If **YES**, please make changes below & supply SS card if possible.

Dependent Name/s (Refer to SS card)	SS #	DOB	M/F	Relationship	Add or Remove
_____	_____ - _____ - _____	____/____/____	____	_____	_____
_____	_____ - _____ - _____	____/____/____	____	_____	_____
_____	_____ - _____ - _____	____/____/____	____	_____	_____

Any additional dependent changes please list on back side of this form.

By signing below, you understand your personal tax return/s is/are prepared based upon the information that you provide to us. It is our goal to make sure that you understand how it is prepared, and to make sure you receive the great service you have come to expect from our company. **When presented with your completed tax return, please review all information to make sure that there are no omissions or misstatements of material facts and income, and all personal information was entered correctly.**

Client Signature: _____ Date: _____



STATEMENT OF UNDERSTANDING

You have chosen the professionals at E-FILE TAX SERVICES OF NEVADA, INC to prepare & file your tax return for the tax year **2023**. In doing so, you are personally telling us that you have received all of your tax information (W-2s, 1099s, etc.) & that your tax return is ready to be filed. Please be aware that payment is due upon completion of your tax return. We will not be able to e-file or release your copies until all payments are collected. If you receive additional information after we file your return, this document is your official notification that should you request our services in filing the required amended return; we will be charging you a minimum of **\$100+ for this additional service**. If there is a state return involved with the amendment, an additional charge of **\$50 will be added** to the total cost of the amended return.

All clients will be given one hard copy of their tax return and may request a PDF copy at the time of the appointment. Should you need additional copies at a later date, we will happily provide them to you; however, there will be a **\$5 charge per copy per return**. We retain copies of your tax return and supporting documents for a period of 5 years. **Proof of identification will be requested before tax information is released to you or a third party. You should keep your original records in secure storage for a minimum of 7 years.**

E-File Tax Services of Nevada, Inc wants to make it clear; if at any time our client/s is involved in a legal matter and E-File Tax Services of Nevada, Inc. is required to act, respond &/or appear for a deposition, court hearing &/or for any other legal matter, our client/s will be responsible for any and all legal costs and a daily fee of \$1500 per tax preparer, per accountant &/or office staff.

1040 INDIVIDUAL TAX RETURN LETTER OF ENGAGEMENT

Thank you for selecting E-FILE TAX SERVICES OF NEVADA, INC to assist you with your tax affairs. This letter confirms the terms of our engagement with you & the nature & extent of services we provide.

We will prepare your **2023** federal & all state income tax returns you request using information you provide to us. We may ask for clarification of some items, but we will not audit or otherwise verify the data you submit. We have a **"Income Tax Organizer"** that you can request to help you gather the information required for a complete return. If you use the **"Income Tax Organizer"**, it will help you avoid overlooking important information & will contribute to efficient preparation of your tax returns. Taking the time to fill out the **"Income Tax Organizer"** can save us time & you money. **The "Income Tax Organizer" is available upon request or on our website at www.efilenevada.com under the "Tax Guides" tab.**

It is your responsibility to provide information required for preparation of complete & accurate returns. You should keep all documents, canceled checks & other data that support your reported income & deductions. This information may be necessary to prove accuracy & completeness of the returns to a taxing authority. **You are responsible for the accuracy of your tax returns, so you should review them carefully before signing them or signing the e-file permission sheet/s.**

Penalties of as much as **\$100,000** can be imposed on you for failing to disclose participation in **"reportable transactions"**, that is, certain arrangement the IRS has identified as potentially abusive. We will insist that all such transactions be properly disclosed. The law also imposes penalties when taxpayers understate their tax liability. If you have concerns about such penalties, Brent or Saundra can address it during your appointment.

Your returns may be selected for audit by a taxing authority. We do offer **"IRS Assistance Assurance (IAA)"** for an additional cost at the time of your appointment. Without this insurance, fees & expenses for the time involved will be incurred, depending on the terms of our engagement. **An information sheet is available upon request.**

We are Licensed Tax Return Preparers & Enrolled Agents, as EAs we can represent you on the local level and further if there is a tax examination. *Please note, we are not authorized to represent you in tax court. For Enrolled Agent representation there are additional fees (\$200/hr. 2 hr. minimum).*

Our fee for preparation of your tax returns will be based on the amount of time required at standard billing rates plus out-of-pocket expense. All invoices are due & payable upon presentation. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (30) days.

Only one signature is required... Signature: _____ Date: _____



IRS ASSISTANCE ASSURANCE (IAA)

PRICE: \$50.00

____ ACCEPTS FOR TAX YEAR 2023

____ DECLINES FOR TAX YEAR 2023

DETAILS: This protection offers you IRS assistance, reviewing IRS letters and responding to the IRS and any local tax agencies for tax return/s prepared by E-FILE TAX SERVICES OF NEVADA, INC. Without this protection, we will charge a minimum of \$100 for IRS letter review, \$100/hour for audit assistance and \$75/letter for any written correspondence to the IRS &/or local tax agency, which you, the client, would be responsible for without IAA.

WHAT THIS PROTECTION PROVIDES YOU:

IRS ASSISTANCE:

If the IRS audits you, we will assist you in answering questions regarding the preparation of your return, help you organize your receipts & guide you in what is required to face the IRS. **(Fees mentioned above will apply without IAA)**

IRS CP LETTERS & INQUIRIES:

If you receive an IRS letter of any kind, we ask that you mail, fax or email a copy of the letter to us for review. Once we have reviewed the letter, we will inform you if any action is required. This could include; paying the amount requested by the IRS and/or doing an amended return **(amendments are an additional cost of \$100+)** and/or writing a response letter/s to the IRS. **(Fees mentioned above will apply without IAA)**

All Income forms: W-2s, 1099s, Retirement & Unemployment, etc. must be given to the Tax Preparer at the time of the tax preparation to validate all claims. Any information omitted at the time of your original tax preparation appointment, due to the lack of the aforementioned forms is not the fault of the Tax Preparer & the IAA will not be implemented. So please make sure everything is given to the Tax Preparer at the time of service & remember it is your responsibility to review "Your Tax Return" prior to signing, mailing and/or e-filing.

CLIENT'S PRINTED NAME

CLIENT'S SIGNATURE

DATE

TAX PREPARER'S PRINTED NAME

TAX PREPARER'S SIGNATURE

DATE

AMENDMENTS ARE \$100+ AND ARE NOT COVERED WITH THE IAA INSURANCE

**** THE IAA DOES NOT COVER ENROLLED AGENT REPRESENTATION BEFORE THE IRS (\$200/hr. 2 hr. minimum)**