

# New Client Information

Taxpayer's Name \_\_\_\_\_ Date of Birth \_\_\_/\_\_\_/\_\_\_ SSN# \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Spouse's Name \_\_\_\_\_ Date of Birth \_\_\_/\_\_\_/\_\_\_ SSN# \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Address \_\_\_\_\_

Taxpayer(s) Occupation(s) \_\_\_\_\_

Contact Email(s) \_\_\_\_\_

Contact Phone(s) \_\_\_\_\_

Preferred Contact Method:    Email    Phone

Do you own or control an LLC, Partnership, S-Corp, or C-Corp?    Yes    No

Are you a dependent on your parent's tax return?    Yes    No

Did you receive health insurance from Healthcare.Gov?    Yes    No

Do you have over \$10,000 combined in foreign bank accounts?    Yes    No

Did you buy/sell bitcoins or other virtual currency?    Yes    No

# Dependent Information

Name \_\_\_\_\_ Date of Birth \_\_\_/\_\_\_/\_\_\_ SSN# \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Relationship to you \_\_\_\_\_ Did dependent have daycare/tuition?

Name \_\_\_\_\_ Date of Birth \_\_\_/\_\_\_/\_\_\_ SSN# \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Relationship to you \_\_\_\_\_ Did dependent have daycare/tuition?

Name \_\_\_\_\_ Date of Birth \_\_\_/\_\_\_/\_\_\_ SSN# \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Relationship to you \_\_\_\_\_ Did dependent have daycare/tuition?

Name \_\_\_\_\_ Date of Birth \_\_\_/\_\_\_/\_\_\_ SSN# \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Relationship to you \_\_\_\_\_ Did dependent have daycare/tuition?

Taxpayer's Signature \_\_\_\_\_ Date \_\_\_\_\_

## Letter of Engagement

Dear Client,

Thank you for choosing Rosetta Tax Service.

In the letter below, you will find the terms, nature, and extent of the services to be provided, and you will be asked to confirm your understanding of any mutual responsibilities. Please read the letter below and sign, so we can begin working on your return.

### **Information and Documents**

Your federal and/or state income tax returns will be prepared with the information you provide. You must provide Rosetta Tax Service with complete and accurate information. The information you provide will be kept confidential. No audit or verification of the submitted data will occur. However, Rosetta Tax Service may follow up to request clarification and/or documentation of information as needed. You will also be notified should any material errors be discovered.

You are responsible for providing all necessary documentation required by law to support your data. This includes expenses for gifts, travel, vehicle use, meals, charitable contributions, and so forth. If you need clarification on what documentation is required, please reach out to us. Professional judgment will be used to resolve issues when tax law is unclear or when there is conflict among authorities. But ultimately, you, the taxpayer, have the final responsibility for your tax return(s). Therefore, it's imperative that you carefully review all documents before signing and filing them.

Please provide originals/copies of originals of all government tax documents (W-2s, 1099s, 1098s, and property tax statements). Any records you give us will be returned to you after we've completed your return. We recommend you store them securely, as well as supporting documents, in case they are needed later in the tax preparation process. Rosetta Tax Service retains copies of all records, paperwork, and notes for three years. after which these documents are securely disposed of.

### **Foreign Accounts**

You are responsible for reporting any foreign activities. By signing this letter, you acknowledge that you will inform us of any income from foreign sources or if you have signatory authority over any foreign financial accounts. If you are still determining whether income/accounts are foreign, please let us know so we can review it. Failure to report these types of activities results in severe penalties.

### **Cryptocurrency**

You are responsible for reporting the purchase or sale of cryptocurrency. This includes trades between currency types.

### **Accuracy and Responsibility**

The responsibility for the accuracy and completeness of the return rests with you. This includes any taxes, interest, and penalties assessed by the taxing authorities. We encourage you to carefully review the completed return before filing and ask any questions you may have. Should any issues occur, we are committed to assisting you in addressing them.

### **LLC & Corporation Compliance**

Please be aware there are specific new reporting requirements involving certain types of companies regarding compliance with the Corporate Transparency Act (CTA), including Beneficial Ownership Information (BOI) reporting. Aiding with this compliance is **not** within the scope of this engagement letter.

### **Spouses and Information Sharing**

Please remember that if we are preparing a joint return for you and your spouse, tax returns and copies of all supporting documents will be made available to both spouses without the other spouse's consent or notification.

### **Deadline**

The filing deadline for tax returns is April 15th. All information must be received by April 1<sup>st</sup> to meet the filing deadline. If additional time to file is needed, your provided information will be used to prepare the extension. Please remember that to prepare a valid and accurate extension, we will need as much information as possible. You will also need to expressly approve filing an extension before this can be done on your behalf. As a reminder, an extension only provides you with additional time to file, not to pay. Taxes paid after April 15<sup>th</sup> will result in late fees and interest.

### **Fees**

Tax preparation fees are charged based on the complexity of work. Invoices are due and payable upon completion.

### **Efiling**

Tax returns will only be filed electronically after signatures are obtained. Under federal and Texas law, Rosetta Tax Service is required to file your returns electronically. However, you can opt out of electronic filing without explanation. If you prefer not to e-file we can provide you with the government opt-out forms. These must then be signed and sent to the IRS by the taxpayer.

### **Audits**

Should the IRS or state tax authorities audit your return, please let us know immediately (as soon as letters are received from the IRS/any other tax agency), so we can react accordingly and be available to assist you. You will be responsible for any taxes owed, in addition to any fees for correction.

### **Scope**

This agreement will conclude at the time completed returns are delivered to you (paper-filing). or upon signature and submission of your tax return(s) (e-filing).

### **Agreement**

To agree to this letter and its summary of our arrangement, please sign below and return it in person or electronically. Work will not begin until a signed copy of this engagement agreement is returned. Should you be filing a joint return. both spouses are required to sign. Thank you for putting your trust in Rosetta Tax Service Please do not hesitate to reach out if you have any questions or concerns.

Acknowledged by:

Signature: \_\_\_\_\_ Print name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Print name: \_\_\_\_\_ Date: \_\_\_\_\_