Dear Valued Client,

Happy New Year! We wish each of you a happy, healthy and prosperous 2019. We look forward to working with you this year to prepare your 2018 Federal and State income tax returns.

Enclosed you will find the following items that must be **signed and returned to us with your tax information**:

- 2018 Tax Engagement Letter – Please review and sign this document and return to our office. We must have this signed letter to engage our services. If you have any questions, please do not hesitate to call.
- 2018 Tax Questionnaire – This questionnaire must be completed and returned in order for us to prepare an accurate tax return. Please attach additional documentation to this questionnaire as needed.
- Organizer – For your convenience, we have included an updated 2018 organizer. **Please use this organizer as a guide** when gathering your 2018 documents ensuring all tax information is received and submitted to our office.

We understand, and respect that your time is valuable. Please know a face to face meeting is not necessarily required, and may not apply to your tax situation. We suggest submitting your tax information to our office through the following options:

1. **Drop** your documents off at our office without a personal meeting.
2. **Scan** all of your documents and send via e-mail: **contact@taxandaccountingspecialists.com**
3. **Mail** copies of original documents to our office.
4. **Fax** your documents to our office: 719-599-3541

In the event you feel a tax appointment is necessary, and you have not received a pre-set appointment card, please call our office to schedule a personal meeting.

Please take a moment to visit our website at **www.taxandaccountingspecialists.com** and find many useful features: stay up to date with current tax and financial news, subscribe to our monthly newsletter, use our helpful financial calculators, view tax tips for businesses and individuals, refer your family and friends and much more!

Your continued confidence and support is greatly appreciated as we head into the 2018 tax season.

Sincerely,

Tax and Accounting Specialists
LeAnn Wilson & Associates, Inc.

6770 Foxtrot Lane, Suite A, Colorado Springs, CO 80924
Office: 719-528-8100 Fax: 719-599-3541

TAX & Accounting Specialists
LeAnn Wilson & Associates, Inc.

2018 Individual Income Tax Engagement Letter

We appreciate the opportunity to work with you. This agreement confirms the services you have asked our firm to perform and the terms under which we will perform that work. Please read this letter carefully because it is important to both our firm and you to understand what will and will not be expected. **Tax preparation will not be initiated by our firm without this signed engagement for services each year.**

We will prepare your Individual Federal and State Income Tax Returns and related schedules for 2018 tax year using the information you provide us. If you have taxable activity in a state other than Colorado, you are responsible for informing us of the applicable state(s). It is your responsibility to meet documentation requirements and to provide us all information necessary to complete your tax returns. We will not audit or verify the data you submit to us; however we may ask you for additional information. Before signing, review carefully for accuracy and completion, as well as omissions or misstatements as you have ultimate responsibility for the information reported on your income tax returns.

You should retain copies of all documents, receipts, canceled checks, and other records needed to substantiate the items of income and deductions which are claimed on your return. We do not keep original documents. Any original information and documentation you provide will be returned to you upon completion of your tax returns. We will provide a copy of your tax return for your records. That delivery will be in the medium of your request: email or paper copy. Additional copies, either email or paper, will be provided for a fee of $40 to be paid in advance of releasing said copies. We will not release your information to anyone without your prior written consent. Dependents 16 and over, which are required to file an income tax return, must provide written consent to us in order to release documents to their parents. All tax returns not picked up within 30 days of completion will be assessed a $10 monthly finance charge.

Fees for our services will be at our standard rates. Your income tax preparation fee does not include bookkeeping services, tax planning, tax projections, or tax consultation services. Other additional fees may include copy costs and computer processing fees. Payment is due upon completion. All income tax return preparation fees must be paid in full prior to the release of the return. We are not responsible for any late fees, penalties or interest imposed by the various taxing authorities for failure to file timely. Any preparation services canceled prior to completion will be billed for time spent at the standard hourly rate of $160 per hour.

We must receive all information necessary to prepare your return by **March 29, 2019**, to ensure that your return will be completed by April 15, 2019. If we do not have all the necessary information, you will need to file a request for an extension of time to file. Fees for this service begin at $40. We will not file extensions unless you specifically request us to do so. If you wish for us to prepare an extension for you, you must notify us by **March 29, 2019**. You must provide us with adequate income information, for us to estimate the amount of tax that you should send with your extension. Filing an extension does not relieve you from paying any tax due on the due date. Failure to pay any tax due with the extension or failure to pay the quarterly estimated tax payments may subject you to various penalties and interest. This estimate will be based solely on the information you provide to us, and we are not responsible for under estimation of tax due to missing information. If an extension ***is not filed,*** you may be subject to late filing or late payment penalties by the taxing authorities.

Your returns are subject to review by taxing authorities. Should an examination occur, we will be available to represent you for an additional fee. If you wish us to represent you it is imperative that you notify us immediately upon receipt of a notice from a taxing agency proposing a change to any income tax return.

In the interest of facilitating our services to you, we may communicate by fax or e-mail. Such communications may include information that may be confidential to you. While we will use our best efforts to keep such communications secure in accordance with our obligations under applicable laws and professional standards, you recognize and accept that we have no control over the unauthorized interception of these communications once they have been sent and you consent to our use of these devices during this engagement.

You, as our client, shall agree to limit the liability of the firm for any and all claims, costs, damages, losses and/or penalties of any nature whatsoever, so that the total aggregate liability of the firm to the client shall not exceed the firm's total fee for services rendered under this agreement. The client and the firm intend and agree this limitation applies to any and all liability or cause of action against the firm, however alleged or arising, unless otherwise prohibited by law. Both parties agree there is a one-year limitation period to bring a claim against the firm for errors or omissions. The one-year period will begin upon the date of signing this agreement.

Estimated tax payments required for 2019 will be calculated according to current tax law legislation.

We appreciate the opportunity to serve you. We are pleased to have you as a client and look forward to a long and mutually satisfying relationship. If you ever have any questions or feel like you need advice regarding a tax or financial matter, please do not hesitate to call us.

Please date and sign below to acknowledge your understanding of the terms and acceptance of your responsibilities of this engagement for the current tax year. **It is our policy to initiate services after we receive this signed engagement letter.**

______________________________	________________________	____________
Print Your Name	**Signature**	**Date**
______________________________	________________________	____________
Print Spouse's Name	**Signature**	**Date**

Please provide your preferred phone number and e-mail address:

Phone: ____

E-mail address: ____

Best Regards,

Tax and Accounting Specialists
LeAnn Wilson & Associates, Inc.

Referred By:______________________________
New Client:________Returning Client:_______

2018 Tax Year Questionnaire

Please complete the following information so we may update our records. If your information is the same as last year and we have prepared your tax returns in the past, just write "same". **See the reverse side for important questions.**

Taxpayer Information:
Last name___________________________________First name________________________________Middle initial_______
Social Security Number_______________________Occupation____
Date of birth_______________________________Work phone_________________________Cell phone______________
E-mail address____
Driver's License #___________________________State_____Issue Date_____________Exp. Date________________
Health Ins. Coverage None:______Full Year:_____Partial (provide details):______________________________

Spouse Information:
Last name___________________________________First name________________________________Middle initial_______
Social Security Number_______________________Occupation____
Date of birth_______________________________Work phone_________________________Cell phone______________
E-mail address____
Driver's License #___________________________State_____Issue Date_____________Exp. Date________________
Health Ins. Coverage None:______Full Year:_____Partial (provide details):______________________________

Dependant Information: (please attach additional dependant information if necessary)
Last name___________________________________First name________________________________Middle initial_______
Social Security Number_______________________Date of birth__________________________Circle: Son / Daughter
Health Ins. Coverage None:______Full Year:_____Partial (provide details):______________________________

Last name___________________________________First name________________________________Middle initial_______
Social Security Number_______________________Date of birth__________________________Circle: Son / Daughter
Health Ins. Coverage None:______Full Year:_____Partial (provide details):______________________________

Address Information:
Street address____Apt. number_________
City__________________________________County___________________________State______________Zip__________

For your files, how would you like to receive a copy of your tax return? Electronic_____ *(No charge)* Hard Copy_____ *(No charge)* Both_____ *($40)*

Direct Deposit Information: Please provide a voided check, or the following bank information:
Bank name____
Acct number________________________________Routing number_________________________Circle: Checking/Savings
I do not want my refund direct deposited: Check Here______

Estimated Federal & State Income Tax Payments:
Did you make any estimated tax payments for 2018? Circle: Yes/No If yes, please provide *exact* amounts and dates:

	FEDERAL AMOUNT	DATE PAID	STATE AMOUNT	DATE PAID
1ST Qtr Due April 15	$________________	___________	$________________	___________
2nd Qtr Due June 15	$________________	___________	$________________	___________
3rd Qtr Due Sept 15	$________________	___________	$________________	___________
4th Qtr Due Jan 15 (2019)	$________________	___________	$________________	___________

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	Y	N		Y	N
Were there any births, marriages, divorces, deaths, or other changes in your household last year? If yes, explain:			Did you make cash or non-cash charitable contributions? Please provide details.		
Do you have dependants who have income and must file a tax return?			Did you incur childcare or dependent care expenses?		
Can you be claimed as a dependent on another tax return?			Do you have a balance borrowed against a home (equity line of credit) in excess of 100,000		
Do you expect your income and deductions this year to be different from last year (e.g. retirement)? If yes, explain:			Did you buy, sell, or refinance a principle residence or other real property last year? If yes, include closing or escrow statements.		
Did you live, own property, or earn income in more than one state last year?			Did anyone in your household have education expenses, student loans, or contribute to a 529 plan?		
Did you start a small business, purchase rental property or own a farm last year? Please request one of our business, rental, or farm worksheets.			Did you move more than 50 miles for work and receive any reimbursement from your employer?		
Are you an owner or shareholder in a corporation, S-corporation, partnership? Please provide form(s) K-1			Did you work from a home office or use your car for business? If so please provide beginning and ending odometer reading and your mileage log for year.		
Did you receive or pay any alimony or maintenance payments? If so, provide recipients SSN / amount paid:			Did you have any medical or charitable miles, or unreimbursed work miles?		
Did you receive unemployment benefits?			Did you or your spouse, or dependents receive disability income?		
Did anyone in your household receive Social Security, retirement or annuity benefits?			Did you or anyone in your household receive a health insurance premium credit? Please provide 1095-A, 1095-B, or 1095-C.		
Did you contribute to, or receive disbursements from, an HSA or retirement plan? Did you convert any funds to an IRA or Roth IRA?			Did you pay any long term care insurance premiums on a qualified policy?		
Did you buy, sell, or trade stocks, bonds, mutual funds, or any other assets last year?			Did you pay any medical expenses including health insurance premiums?		
Did you have any investment related expenses?			Did you have any financial accounts or property in a foreign country?		
Did anyone in your household have any interest, dividends or capital gains income?			Did you make any large purchases or home improvements? (A vehicle, trailer, energy saving appliances, etc.)		
Did you file for bankruptcy or have a foreclosure, short sale or cancellation of debt?			Do you wish to have $3 of your taxes applied to the Presidential Campaign Fund?		
Did you have any casualty/ theft losses last year?			Any charity or political contributions on state return?		
Do you have a vacation home or do you rent out your personal residence (e.g. AirBnB or VRBO)?			Are you supporting anyone not living with you?		
Has the IRS/State/Local taxing authority made you aware, or are you aware, of any changes to your income, deductions & credits reported on any prior tax returns?			Did you pay wages of $1,900 or more in any calendar quarter during the year to any one household employee?		
Did you make any gifts during the year directly or in a trust exceeding $15,000 per recipient?			Are any of your household members blind and/or disabled? Name:		

Have you provided ALL your deductions and income from ALL sources? Please use the space provided below to include any additional information, or details for the above questions. If necessary, attach additional pages.

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By signing below, I agree that the information included on this form and all other documentation provided to Tax and Accounting Specialists, Inc. is true and accurate to the best of my knowledge. I have all documentation for the income and deduction information I have provided.

Signature Taxpayer____ **Date**____________________

Signature Spouse____ **Date**____________________

TAX & Accounting Specialists
LeAnn Wilson & Associates, Inc.

Privacy Policy
Of
Tax and Accounting Specialists
LeAnn Wilson & Associates, Inc.

Enrolled agents, like all providers of personal financial services, are now required by law to inform their clients of their policies regarding privacy of client information. We have always protected your rights to privacy.

Types of Nonpublic Personal Information We Collect

We collect nonpublic personal information about you that is provided to us by you or obtained by us with your authorization.

Parties to Whom We Disclose Information

For current and former clients, we do not disclose any nonpublic personal information obtained in the course of our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, and in limited situations, to unrelated third parties who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared.

Protecting the Confidentiality and Security of Current and Former Clients' Information

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

Please call if you have any questions, because your privacy, our professional ethics, and the ability to provide you with quality financial services are very important to us.

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