

**NEW CLIENT  
ALL INFORMATION MUST BE ENTERED**

**Name(s)** as it appears on your Social Security card:

\_\_\_\_\_

Date(s) of Birth: \_\_\_\_\_

License Information – Self:

License # \_\_\_\_\_ State \_\_\_\_\_ Issue Date \_\_\_\_\_

Expiration Date \_\_\_\_\_ First 3 Characters of Document # \_\_\_\_\_

License Information– Spouse :

License # \_\_\_\_\_ State \_\_\_\_\_ Issue Date \_\_\_\_\_

Expiration Date \_\_\_\_\_ First 3 Characters of Document # \_\_\_\_\_

Occupation(s) (as you want listed on your return): \_\_\_\_\_

Phone: \_\_\_\_\_ Can this # receive Text messages? YES NO

Email: \_\_\_\_\_

Current address: \_\_\_\_\_

Did you buy a new house? YES or NO

Did you have health insurance for the entire year? YES NO Partial Year

**Please provide the 1095 form (A, B, or C) from insurer. IMPORTANT REQUIRED**

Do you have any dependents to claim? YES or NO

Please provide the full name, social security number, and date of birth of each person:

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

Direct Deposit for tax refunds:

Routing Number(9 digits): \_\_\_\_\_ Bank Name: \_\_\_\_\_

Account Number: \_\_\_\_\_

How would you like to receive your copy of the tax return? (Circle at least one)

Email Digital (pdf)

Paper – by mail

Paper – Office pick up

Would you like to review your tax return by pdf before it is e-filed? YES NO

How would you like to pay for the services of Susan G Baer, CPA, P.C.?

Debit the Bank Account Above or Paper Check

Credit Card: Visa or Mastercard (3% fee added)

Credit Card# \_\_\_\_\_ Exp date \_\_\_\_\_ 3-digit code \_\_\_\_\_

(Over/Next page)

### Engagement Letter- Tax Return

We will prepare your federal and state income tax returns based on information you furnish to us. This engagement pertains to the 2018 tax year, and our responsibilities do not include preparation of any other tax returns due to any taxing authority.

It is your responsibility to provide all the information required for the preparation of complete, accurate and timely returns. We will furnish you with or you may access information, checklists and/or worksheets from our website as needed to guide you in gathering the necessary information. Your use of such forms will assist us in keeping our fee to a minimum and efficiently processing your data. To the extent we render any accounting and/or bookkeeping assistance, it will be limited to those tasks we deem necessary for preparation of the returns.

You represent that there is adequate substantiation to support deductions for any expenses claimed on the return. We will not audit or otherwise verify the data you submit to us, although we may ask you for clarification on information. You are ultimately responsible for the accuracy of your return and should review it carefully before approving/signing it. You should retain all the documents, canceled checks, and other data which form the basis of your reported income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority request.

If there is an error on the return resulting from incorrect information supplied by you, or due to your subsequent receipt of amended or corrected tax form(s) (W-2's, 1099's, K-1's), you are responsible for the payment of any additional taxes which would have been properly due on the original return(s), along with any interest and penalties charged by the IRS.

Your returns may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination, we will be available upon request to represent you and will render additional invoices for our time and expenses incurred.

Our fee for these services will be based upon the amount of time required at standard billing rates plus out-of-pocket expenses. All invoices are due and payable upon presentation. Tax returns are electronically filed or presented only after payment is received.

If the foregoing fairly sets forth your understanding, please sign below. However, if there are other tax returns you expect us to prepare, please inform us by noting so at the end of this letter or via email at **[northeastcpa@gmail.com](mailto:northeastcpa@gmail.com)**.

Very truly yours,

Susan G, Baer, CPA, P.C.

Accepted By: \_\_\_\_\_ Date: \_\_\_\_\_