698 S VERMONT #204
LOS ANGELES, CA 90005

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CARLOS APARICIO

**Client Intake Form and Letter of Engagement**

Date: _____ Returning Client: ☐ New Client: ☐

**Last Name:** _____ First Name: _____ SSN: _____-_____-_____

Occupation: _____ Date of Birth: _____/_____/_____

Email Address: _____ Phone Number: (  ) _____-_____

Address: _____ City: _____ Zip Code: _____

Driver's License #: _____ Issue Date: _____/_____/_____ Exp. Date: _____/_____/_____

**Filing Status:** Single ☐ Married Filing Joint ☐ Married Filing Single ☐

**Type of Return:** Individual ☐ Partnership ☐ Corp ☐ LLC ☐

**Spouse Information**

**Last Name:** _____ First Name: _____ SSN: _____-_____-_____

Occupation: _____ Date of Birth: _____/_____/_____

Email Address: _____ Phone Number: (  ) _____-_____

Address: _____ City: _____ Zip Code: _____

Driver's License #: _____ Issue Date: _____/_____/_____ Exp. Date: _____/_____/_____

Did you (and your spouse) have health insurance in 2017: Yes ☐ No ☐ Covered CA? ☐

Do you have any Retirement Accounts: Yes ☐ No ☐ Type (401k, IRA, Roth)? _____

Foreign Accounts: Yes ☐ No ☐

Direct Deposit Information (pending tax results)

Bank Name: _____

Routing Number: _____ Account Number: _____
(or attach voided check)

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## Letter of Engagement for Tax Services

This letter of engagement is entered into _____ (date) between _____ (Client) and Daddy Don's Tax Service, Inc., (Consultant).

Client hires and retains Consultant for the purpose of providing those professional consulting services and specified below on this Letter of Engagement.

Client agrees to pay Consultant a retainer for professional fees for work as described below.

Consultant will collect a retainer fee of $300.00, upon intake of tax information. Depending on the scope of the work, required to complete an accurate tax return, additional fees may be due upon completion. Final invoicing and billing is based on time, forms, schedules, and worksheets required to complete tax returns. The hourly billing rate for work is $175.00/hour.

Client has retained Consultant to prepare tax returns for _____ tax years.

Client understands and further acknowledges that Consultant is not a licensed attorney authorized to practice law in the State of California. Consultant does not provide or give legal advice of any kind. Client understands it is the responsibility of the Client to obtain independent legal advice in matters dealing with the law, or the effect of legal decisions.

Any advice provided to the Client by Consultant is limited to tax advice, and limited to the scope of this agreement for specific tax preparation services which may include business consulting services as agreed.

## Specific Professional Services to be Provided

Consultant agrees to perform the following specific professional services for Client in connection with this Letter of Engagement:

1. Client will deliver all information necessary for preparation for tax return, including, but not limited to: W25, 1099s, tax and interest statements to Consultant.
2. Prepare Federal and State returns.
3. Review and documentation necessary to complete returns.
4. Electronically file returns for processing with the IRS/State.
5. Provide any necessary support required by IRS/State.
6. Description of other services as described: _____
7. IRS Form 2848 and State of California Form 3520, and any other states required to file taxes, specifically for tax issues.

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## Billing

A **retainer** of $300.00 ***per tax year*** ($125.00 for Federal, $125.00 for State, $50.00 processing) is due upon intake from Client. This is the initial retainer for professional services, not the total fee charged for the completion of accurate and concise tax returns.

_____ INITIAL

Any modification, amendments, or changes to the Letter of Engagement must be made in writing between the parties and attached to this original agreement. Verbal representations or agreements are not binding upon either party.

Client further agrees to fully cooperate with Consultant, or its assistants, in providing timely responses to all requests in connection with the professional services provided for this by this Letter of Engagement. All fees, costs, and charges are considered earned by Consultant upon receipt.

For additional tax consulting and management services and communications with tax authorities, Consultant's rate is $175.00/hour.

Client understands that there is a **NO REFUND POLICY** for professional services rendered.

Client understands there is a **24 hour appointment cancellation policy**. If client does not call to cancel a scheduled appointment within 24 hours from the date and time of appointment charge of $75.00 will be assessed to Client.

Client acknowledges that they have read this entire Letter of Engagement.

_____ INITIAL

Name _____
(Please Print)

Client Signature _____ Date _____

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## Payment for Tax Services

WE ACCEPT VISA, MASTERCARD, OR BANK DEBIT CARDS FOR PAYMENT

The preliminary retainer of $300.00 *per tax year* will be processed against the card upon intake of information.

_____ INITIAL

The remaining charges for the preparation of the tax returns will be billed to this card upon completion of the final tax return. Upon completion, a final invoice will be produced for time, worksheets, forms, and schedules, for the preparation of the tax return and accordingly billed against the credit card submitted. Full payment is required for release of tax preparation documents and professional fees upon completion of work.

By signing, Client agrees to payment terms of $300.00 *per tax year* to be charged to my credit card upon intake and the **balance due** is to be charged to my credit card upon completion.

_____ INITIAL

Name _____
(Please Print)

Client Signature _____ Date _____

Card Type
☐ VISA ☐ MASTERCARD

Name (as it appears on card) _____

Card Number _____

Expiration Date (MM/YY) ____/____

Security Code (3 digit) _____

Billing Zip Code _____

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