

Name \_\_\_\_\_

Phone Number \_\_\_\_\_ Best time to call \_\_\_\_\_

Email address \_\_\_\_\_

Address same as prior year? \_\_\_\_\_ Yes \_\_\_\_\_ No

IF NO THEN CURRENT ADDRESS AND DATE OF MOVE -

\_\_\_\_\_

Do you and all dependents have health insurance as of today? \_\_\_\_ Yes \_\_\_\_ No

IF INSURANCE PURCHASED THROUGH THE MARKETPLACE THEN 1095A IS NEEDED.

Direct Deposit Information – Name of Bank - \_\_\_\_\_

Routing - \_\_\_\_\_ Account number - \_\_\_\_\_

How much were your charitable contributions for 2020? \_\_\_\_\_

At any time during 2020 did you receive, send, sell, exchange or otherwise acquire any financial interest in any virtual currency? \_\_\_\_\_ Yes \_\_\_\_\_ No

How much did you receive for your first stimulus? \_\_\_\_\_ 2<sup>nd</sup> \_\_\_\_\_

Did you do any energy efficient home improvements, such as doors, windows, and insulation or heating/air systems, solar? \_\_\_\_\_ Yes \_\_\_\_\_ No

Are you a retired correctional officer, law enforcement officer or fire, rescue or emergency services personnel? \_\_\_\_\_ Yes \_\_\_\_\_ No

Did you contribute money to a traditional or ROTH IRA? \_\_\_\_\_ Yes \_\_\_\_\_ No

Did anyone claimed on your tax return attend college in 2020? \_\_\_\_ Yes \_\_\_\_ No  
If yes then form 1098T required.

**Attach additional information for any Yes answers above.**

**Sign and initial the attached engagement letter/privacy policy**

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DO YOU WISH TO HAVE YOUR TAX PREP FEE WITHHELD FROM YOUR REFUND?  
FEE - \$60.00 \_\_\_\_ YES \_\_\_\_ NO. IF YES THEN COPY OF TAXPAYER/SPOUSE  
DRIVER'S LICENSE REQUIRED. (Established clients only)

May we email you with further questions? \_\_\_\_\_ Yes \_\_\_\_\_ No

May we text you? \_\_\_\_\_ Yes \_\_\_\_\_ No

**ANY ADDITIONAL INFORMATION OR CONCERNS:**

**Messick's Tax Associates, Inc**  
**Tax Return Preparation Engagement Letter**  
**and Privacy Policy**

Thank you for choosing Messick's Tax Associates to assist you with your tax return. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we provide.

We will prepare your federal and state income tax return for the year ended December 31, 2020. You represent that the information you have provided is complete, true and accurate, disclosing all relevant facts. We do not audit the data you submit, although we may request clarification of the information from you. We will use our judgment in resolving questions where the tax law is unclear or where there may be different interpretations of the law, and try to resolve such questions in your favor if there is reasonable justification for such a position. Our work does not include procedures to find irregularities, but we will inform you of any material errors, fraud, or other illegal acts we discover. It is your responsibility to inform us of any foreign income or assets which must be disclosed to the IRS with the filing of your return. Please review your return for any inaccuracies prior to electronic filing as you are verifying that all information on the return is true and accurate with your signature including all bank account and routing numbers for direct deposit. Messick's Tax Associates, Inc. or our employees are not responsible for incorrect information once you have signed and submitted your return for electronic filing.

Taxing authorities, by regulation, require you to retain information substantiating all items reported on your returns. You should retain your tax return records and returns for a minimum of five (5) years after the filing date. Your returns may be subject to review (audit) or you may receive requests for additional information from the tax authorities. If your return is selected, it does not mean there is a problem. In your interest, it is advisable to contact us immediately upon receiving correspondence from the taxing agency. Audit services are not a part of this engagement. If your return is selected for audit, it is important for you to realize that you are solely responsible for providing the documents and other substantiation to the tax authorities. We may be available to assist or represent you if an examination occurs, charging additional fees based on a standard hourly rate then in effect.

If there are errors on the returns prepared from the data you provided to us, we cannot be held liable for the payment of the additional tax that would have been properly due on the original returns. However, we may be liable for any penalties charged as a result of the incorrect payment of tax when the penalty results from an error in the preparation of the return by us. In the event of a dispute between preparer and taxpayer, we agree to resolve through mediation.

Fees for our services are generally computed according to forms and time-difficulty and are due prior to the filing of your return. We do, however, reserve the right to ask for retainer fees to be paid in advance of any work performed. We reserve the right to perform no work unless we have a signed engagement letter in our possession.

\_\_\_\_\_ Initial

## Privacy Policy

It has always been the policy of Messick's Tax Associates to keep all information that we collect from you confidential from all sources. We maintain physical, electronic, and procedural safeguards to guard your nonpublic personal information. Our employees are bound by internal confidentiality policies and are subject to disciplinary action for any policy violations. We do collect nonpublic personal information about you from the following sources:

- Information we receive from you on tax preparation organizer, worksheets, Federal and State tax reporting forms, and from other documents we use in tax preparation.
- Information about your transactions with us, our affiliates, and others.
- Information we may receive from outside agencies such as banks and brokerage houses

We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as instructed by you in writing or as required by law as listed below:

- Requirements to comply with federal, state, or local law.
- Requirements to comply with national, state, or local licensing rules.
- Requirements to disclose information in response to legal subpoenas.
- Items you permit or request us to disclose, as authorized by you in writing.
- Information that you authorize us to disclose by signing this engagement letter to electronically file your tax return.

If the income tax returns we are to prepare in connection with this engagement are **joint returns**, and because you will each sign those returns, each of you is our client. You each acknowledge that there is no expectation of privacy from the other concerning our services in connection with this engagement, and we are at liberty to share with **either** of you, without the prior consent of the other, any and all documents and other information concerning preparation of your joint returns.

**I have read the above engagement letter and privacy policy and understand my responsibilities with regard to income tax preparation.**

Accepted by:

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Taxpayer Signature

Date

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Spouse Signature

Date