



# Mint Horizons

Dear Family

Thank you for having us prepare your 20\_\_ Income Tax Return.

It was a pleasure to serve you and we are honored that you trusted us with this important task. Your return was carefully prepared by a Tax Professional and you can rest assured that all information from your return will remain confidential.

We have worked hard over the past 16 years to merit trust and confidence, and spend many hours between January 1<sup>st</sup> thru December 31<sup>st</sup> keeping abreast of all tax changes that could be beneficial to your future income tax returns.

If you are satisfied with our services, please recommend us to a friend and/or comment on Facebook and Google about your experience.

In the meantime, if you have any questions regarding your tax return, please give us a call.

We look forward to serving you again next year. Remember we love referrals.

Thank you for your business.

*Yolanda Edwards*

Mint Horizons

Yolanda Edwards



## **General Engagement Letter for Individuals Tax Return Preparation**

This letter is to inform you and the taxpayer of the services that will be provided to you, and the responsibilities you have for the preparation of your tax return.

### **Tax Return Preparation**

- We will prepare your 20\_\_ Federal and State tax returns based on information you provide. Services for preparation of your return do not include auditing or verification of information provided by you. This engagement does not include any audit or examination of your books or records. In the event your return is audited, you will be responsible for verifying the items reported.
- You must review the return carefully before signing to make sure all information is correct.
- If you owe from the previous year your fees must be paid before your tax return is delivered to you or filed for you. **If you terminate this engagement before completion, you agree to pay a fee for work completed \$65. A retainer is required for preparation \$65.**
- Fees charged for tax return preparation **do not** include audit representation or preparing materials to respond to correspondence from taxing authorities (IRS, State, and Mailing).
- **Any additional help with dealing with the IRS on your behalf is \$65 per hour.**
- The engagement to prepare your 20\_\_ tax return terminates upon delivery of your completed returns and original documents to you. Please store your supporting documents and copies of your tax returns in a secure place for at least seven years.

### **Taxpayer Responsibilities**

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed returns contain all relevant information.
- **Anything outside of tax preparation is additional \$65 per hour. Examples: Calling IRS on your behalf, Responding to any letters the IRS has mailed to you etc. Amending any tax year is \$50 and if you owe and we help you with making the payment is \$65.**
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documents.
- You must be able to provide written records of all items included on your return if audited by either the IRS or State tax authority. We can provide guidance concerning what evidence is acceptable for \$65.

### **Signatures**

By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities and that you understand our responsibilities in preparing your tax returns as explained above. For a joint return, both taxpayers must sign.

---

Taxpayer

Spouse

Date

### **Private Policy**

The nature of our work requires us to collect certain nonpublic personal information about you from various sources. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to any third party without your consent, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with Federal Regulations that protect your personal information from unauthorized access.



**Please Print Clearly**

**Filing Status:** Single \_\_\_\_ Head of Household \_\_\_\_ Joint \_\_\_\_ Filing Separate \_\_\_\_

**Taxpayer:** \_\_\_\_\_

**Spouse:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State** \_\_\_\_\_ **Zip** \_\_\_\_\_

**Yours D.O.B:** \_\_\_\_/\_\_\_\_/\_\_\_\_

**SSN:** \_\_\_\_-\_\_\_\_-\_\_\_\_

**Spouse D.O.B:** \_\_\_\_/\_\_\_\_/\_\_\_\_

**SSN:** \_\_\_\_-\_\_\_\_-\_\_\_\_

**Email Address:** \_\_\_\_\_ **Spouse:** \_\_\_\_\_

**Phone Number:** \_\_\_\_\_

**Occupation:** \_\_\_\_\_ **Occupation:** \_\_\_\_\_

**1. Child Full Name:** \_\_\_\_\_

**D.O.B:** \_\_\_\_/\_\_\_\_/\_\_\_\_

**SSN:** \_\_\_\_-\_\_\_\_-\_\_\_\_

**Name of School:** \_\_\_\_\_

**2. Child Full Name:** \_\_\_\_\_

**D.O.B:** \_\_\_\_/\_\_\_\_/\_\_\_\_

**SSN:** \_\_\_\_-\_\_\_\_-\_\_\_\_

**Name of School:** \_\_\_\_\_

**3. Child Full Name:** \_\_\_\_\_

**D.O.B:** \_\_\_\_/\_\_\_\_/\_\_\_\_

**SSN:** \_\_\_\_-\_\_\_\_-\_\_\_\_

**Name of School:** \_\_\_\_\_

**Can anyone be claimed as a dependent on someone else's Tax Return?**

**YES** \_\_\_\_ **NO** \_\_\_\_





**Mint Horizons**

## Checklist for Taxes

### HERE IS WHAT YOU NEED TO FILE FOR YOUR TAXES

- ☐ Proof of identification (**Drivers License, Government issued Photo I.D.**).
- ☐ Social Security Cards for you and all dependents and/or Social Security Number Verification letter issued by the Social Security Administration. If you or your dependent are not eligible to get a Social Security Number, you may need to obtain an Individual Taxpayer Identification Number (**ITIN**). We can help you do this.
- ☐ Birth dates for you, your spouse and any dependents on the tax return.
- ☐ Wages and Earnings statement(s) Form **W-2, W-2G, 1099-Misc and 1099-R**, from all employers and payers. If you have not received your Forms W-2 from your employer and want to know what to do, we can help. CALL US.
- ☐ Interest and Dividend Statements - **Forms 1099-INT and 1099-DIV**.
- ☐ Social Security **Form SSA-1099**, State Income Tax refund and Unemployment Compensation Statement **1099-G**.
- ☐ Information on Broker and Barter Exchange Transactions **Form 1099-B**.
- ☐ Record of rental income and expenses, IRA contributions, and alimony paid or received.
- ☐ Mortgage Interest Statement **Form 1098** and record of the purchase or sale of your residence.
- ☐ Receipts for medical, Eyecare and Dental expenses (**YOU PAID OUT OF POCKET**).
- ☐ Receipts for CASH and NON-CASH Charitable Contributions
- ☐ **NEW CLIENTS ONLY:** A copy of your last year Tax Return (**Federal and State**), if available.
- ☐ Total amount paid for a Daycare Provider and their information (**Name, EIN or SSN, Address, and Phone Number for daycare provider**). All daycare is not deductible.
- ☐ To file taxes electronically for a married couple who are filing JOINT, both parties must sign and be present.



2470 St. Rose Pkwy, 212 Henderson NV 89074 (702) 931-7866 Office (702) 825-3690 Fax

**Current Contact Information for Correspondence Client**

Name: \_\_\_\_\_  
Client Mailing Address: (No P.O. Boxes) \_\_\_\_\_  
City, State & Zip Code: \_\_\_\_\_  
Contact Phone(s): \_\_\_\_\_  
Email Address: \_\_\_\_\_

**Client Credit Card Information**

Name on Card (if different): \_\_\_\_\_  
Client Billing Address (if different): \_\_\_\_\_  
City, State & Zip Code: \_\_\_\_\_  
Type of Card (Visa, MasterCard, Discover, American Express): \_\_\_\_\_  
Card Number: \_\_\_\_\_  
Expiration Date: \_\_\_\_\_  
Card Security Code: \_\_\_\_\_

\_\_\_\_\_ I understand that my Credit Card will be charged for the retainer fee of \$65 upon delivery of this Engagement Letter. This fee is nonrefundable when the work has started.

\_\_\_\_\_ I understand that the cost of my Personal Income Tax Returns will start at \$188 and additional charges may apply depending on the work necessary to complete the returns.

**Upon completion of my Tax Returns (please check one of the following and fees may apply)**

\_\_\_\_\_ I would like an electronic copy of my Tax Returns emailed to me.

\_\_\_\_\_ I would like a hard copy of my Tax Returns mailed to me.