TAXLogix

HOLISTIC TAX PREP SERVICE

Welcome! It's tax season…time to complete those 2020 taxes.

Along with adding some valuable enhancements to this year's tax preparation services, we are still committed to giving quality service and keeping the tax preparation fees affordable as we have in years past.

What's changed?

- Payment Methods – We have added the option for you to pay the tax preparation fees using a credit or debit card. There is a fee of 3% associated with the transaction. You are still welcome to pay with a check at no additional cost.
- CoVid 19 Restrictions – For the health and safety of our clients and staff, we will be primarily using drop off service this year. You can schedule a time that is convenient for you to drop off your information or you can scan and email your information directly to our tax professionals. If you need to schedule time with your tax preparer, we can arrange a phone or Zoom meeting at a convenient time for your schedule.

What has not changed?

- Audit Defense and Identity Theft Protection will be included with your tax return at no additional cost.
- You will still have the opportunity to meet virtually with a tax preparer who will take the time to learn about your situation and review the return for accuracy and completeness.
- The return will be completed within seven days of the receipt of all necessary documents.
- All returns will be reviewed by an advisor who examines the return aiming to maximize savings. If potential planning opportunities are identified, the information is shared with the client and steps are taken to minimize tax impact today and in the future.
- You will receive an elevated tax filing experience without the costs found at a traditional CPA firm.

PRIVACY POLICY
TAX YEAR 2020

TaxLogix, like all providers of financial insurance and personal income tax preparation services, is required by law to inform our clients of our policies regarding privacy and client information. We are always committed to protecting your personal information and right 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 with your authorization. We collect and use this information to service your accounts and respond to requests.

Parties to Whom We Disclose Information

For current and former clients, we do not disclose any non-public 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 thir parties who need that information to assist us in providing services to you. We may refer this information to an affiliated financial or tax professional where such referral is thought to be in your interest. Please advise us if instead you would require us to hold all information, including basic directory information, confidential under any circumstance. We restrict access to non-public personal information to those professionals necessary to helping you achieve your goals and we maintain physical, electronic, and procedural safeguards.

How Do We Collect Data and How Long Data is Stored

Whenever we collect personal data in our office via paperwork, during a personal interview or via our website systems, this policy informs you about the extent to which we collect. All personal data will normally be stored until it has fulfilled the purposed for which it was collected. However, if a prospective client wants his/her personal data removed from our databases, we will delete that data upon ***written request*** in accordance with applicable laws.

Policies Regarding Our Website Systems

TaxLogix is committed to continuous improvement. We may gather and analyze non-personal data regarding the use jof jour websites including domain names, number of hits, pages visited, length of user sessions, etc. to evaluate the usefulness of our sites. These numbers are used for statistical purposes only. The personal information gathered may be transferred to areas with TaxLogix, and organizations outside of TaxLogix for marketing analysis. It will only be used according to the purpose described on the respective page where the data is collected. We will not share the personal information.

Keeping Up to Date with Our Privacy Policy

As required by law, TaxLogix will provide notice of our policy annually as long as you maintain an ongoing relationship with us. To receive a copy of the most up to date privacy policy, call us at 469-698-3322.

Confidentiality and Security

Our employees are required to follow procedures with respect to maintaining the confidentiality of our clients' non-public personal information. If at any time you are not satisfied with our procedures to protect your privacy, or if you have questions regarding the collecting and/or use of your personal data, please contact us. We will use all reasonable efforts to promptly address your concern. Your privacy, our professional ethics, and the ability to provide you with quality insurance and tax preparation services are very important to us.

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PERSONAL INFORMATION TAX YEAR 2020

PLEASE COMPLETE PRIOR TO APPOINTMENT

PRIMARY TAXPAYER INFORMATION

FIRST NAME	MIDDLE NAME	LAST NAME	DATE OF BIRTH
STREET ADDRESS	CITY	STATE	ZIP CODE
EMAIL ADDRESS	PRIMARY PHONE	2ND PHONE	OCCUPATION
SOCIAL SECURITY NUMBER	DRIVERS LIC. NUMBER	DRIVERS LIC. STATE	DRIVERS LIC. EXPIRATION

SPOUSE INFORMATION

FIRST NAME	MIDDLE NAME	LAST NAME	DATE OF BIRTH
STREET ADDRESS	CITY	STATE	ZIP CODE
EMAIL ADDRESS	PRIMARY PHONE	2ND PHONE	OCCUPATION
SOCIAL SECURITY NUMBER	DRIVERS LIC. NUMBER	DRIVERS LIC. STATE	DRIVERS LIC. EXPIRATION

DEPENDENT INFORMATION

FIRST NAME	MIDDLE NAME	LAST NAME	SOCIAL SEC. NUMBER	DATE OF BIRTH	CHILD CARE EXPENSES
					YES NO
					YES NO
					YES NO
					YES NO

FILING STATUS

SINGLE MARRIED FILING JOINTLY MARRIED FILING SEPERATELY HEAD OF HOUSEHOLD

QUALIFYING WIDOWER WITH DEPENDENT CHILD

CLIENT AGREEMENT AND ENGAGEMENT LETTER – TAX YEAR 2020

Thank you for choosing TaxLogix to assist you with your 2020 taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide as well as your responsibilities.

We will prepare your 2020 federal, state, and city income tax returns. We will depend on you to provide the information we need to prepare and complete accurate returns. It is your responsibility to provide complete and accurate information. Services do not include verification of the information that you provide. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. An organizer is enclosed to help you collect the data required for your return. The organizer will help you avoid overlooking important information. By using it, you will contribute to the efficient preparation of your returns and help minimize the cost of our services.

We will perform accounting services only as needed to prepare you tax returns. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will inform you of any material errors, fraud, or other illegal acts we discover.

The law imposes penalties when taxpayers underestimate their tax liability. Call us if you have concerns about such penalties. Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

Our fee is based on the time required at standard billing rates plus out-of-pocket expenses. Invoices are due and payable upon presentation. All accounts not paid within thirty (30) days are subject to interest charges to the extent permitted by state law.

We will return your original records to you at the end of this engagement. It is your responsibility to store these records, along with all supporting documents, canceled checks, etc. in a secure location in case these items are needed later to satisfy tax authority inquiries. We retain copies of your records and our work papers for your engagement for seven years, after which these documents will be destroyed.

Our engagement to prepare your 2020 tax returns will conclude with delivery of the completed returns to you (if paper filing) or your signature and our subsequent submittal of your tax return (if e-filing). If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax return document carefully before signing them.

My 2020 tax return will be filed electronically to allow faster processing by the IRS. It is my responsibility to review it for accuracy. If I find changes are needed, I will contact my tax preparer immediately. I understand the electronic filing process and will contact my tax preparer should I have any questions or changes to my return.

Joint returns require both spouses to pick up the tax return and sign the IRS e-file forms. A copy of a state issued identification will also be required.

CHARGES:

$199 – Includes Complete Tax Preparation for Individuals - Includes E-filed Personal, Single or Joint Federal and One State Return for One Tax Year Including Schedules A,B, and D

ADDITIONAL CHARGES:

$29 each Schedule E or F
$79 each Schedule C
$49 each State Return or City Return
$99 each Amended Return
$79 each Dependent Return

The estimated cost of my return will be $ **Estimation Wil Be Provided by Tax Preparer Prior to Beginning Work on Return**

BUSINESS RETURN

$299 + Business Return
*$299 is the base price for a business return –
Final Fees Based on Hours Required and Complexity

VARIES

Complex Schedule D or Trust Return
Discuss Fees with Preparer

Tax Preparer: Ashlea Lincoln

I have read and agree to the terms of the engagement with TaxLogix in completing my 2020 income tax returns.

Client Signature: ______________________________ Date: ______________________

Print Name: ______________________________

Client Signature: ______________________________ Date: ______________________

Print Name: ______________________________

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HOLISTIC TAX PREP SERVICE

CONSENT FOR USE OF TAX RETURN INFORMATION
TAX YEAR 2020

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use, without your consent, your tax return information for purposes other than the preparation and filing of your tax return.

If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year.

I hereby consent to the use of any and all tax return information contained in my federal income tax returns (Form 1040 series and supporting schedules) by TAXLogix for the purpose of reviewing for accuracy and to potentially assist with retirement planning services including SEP, Roth, Simple IRA/401/403b and Thrift Savings Plan contributions and rollovers as well as estate, financial, insurance (life, long term care, medical), tax planning, annuities, and investments by way of example and not limitation.

____ ___________________________

Taxpayer's Signature Date

____

Taxpayer's Printed Name

____ ___________________________

Taxpayer's Signature Date

____

Taxpayer's Printed Name

____ ___________________________

Tax Preparer's Signature Date

____

Tax Preparer's Printed Name

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484 or by email at complaints@treas.gov.

YOUR 2020

TAX PREP CHECKLIST

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PERSONAL INFORMATION

- [ ] Social Security Number/Tax ID for Client and Spouse
- [ ] Full Names and Birth Dates for All Individuals Included on Your Return
- [ ] New Clients Tax Returns for Previous 2 Years
- [ ] Spouse's Full Name, SSN, and/or Tax ID Number

DEPENDENT INFORMATION

- [ ] Dates of Birth/SSN – Each Dependent
- [ ] Childcare Records/Costs
- [ ] Income of Other Adults in Household
- [ ] Individual Form 8382

SOURCES OF INCOME

- [ ] W2 Forms
- [ ] Self-Employment-Records of Income and Expenses for Business Activities Including Home Office Expense
- [ ] Brokerage Account Statements that Include Date of Purchases/Sales, Cost Basis, Gain/Loss
- [ ] K-1 Statements
- [ ] Unemployment Information (1099 G)
- [ ] Other Income – Annuities, Pensions, Interest Income, Gambling Winnings, Royalties, Alimony, Debt Cancellation
- [ ] Income from Property – Business, Rental or Farm Income
- [ ] Income from Dividends or Trusts

DEDUCTION INFORMATION

- [ ] Child and Dependent Care Expenses
- [ ] Home Purchase or Refinance (HUD1 Statement)
- [ ] Medical Expenses and Health Insurance
- [ ] Home Ownership – Form 1098, Real Estate Taxes, Property Tax Records, Receipts for Receipts for Energy Saving Improvements, Other Home Improvements, All 1098 Series Forms,
- [ ] Health Savings Contributions or Withdrawals (HSA) Form 1095 A,B,C if Applicable
- [ ] Educator Expenses/K12
- [ ] Post-Secondary Education Expenses
- [ ] Depreciation Expenses Business or Rental
- [ ] Statements/Receipts for Itemized Deductions – Charitable Donations, Casualty/Theft Loss, Preparation Fees, Sales Tax Paid, Escrow Statements for Real Estate Purchased or Sold (Escrow Statements)
- [ ] Taxes Paid - Cancelled Check or Statements for Property Taxes Paid or for Estimated Taxes (Federal, State, and Local