



## PRIVACY POLICY TAX YEAR 2021

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 our employees and independent contractors 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 third 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 purpose 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 of our 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.



PERSONAL INFORMATION TAX YEAR 2021  
**\*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       | 2 <sup>ND</sup> 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       | 2 <sup>ND</sup> 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 |                        |                           |                   |



## GENERAL POLICIES AND PROCEDURES

Thank you for choosing TaxLogix to assist you with your 2021 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 2021 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.

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.

The engagement to prepare your 2021 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 documents carefully before signing them.

My 2021 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.

FEES AND CHARGES

PERSONAL RETURNS BASE PRICE

\$219 – 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
- \$79 each            Dependent Return
- \$ TBD            Excessive Schedule D Entries (To Be Determined By Tax Preparer)

BUSINESS RETURNS \$299 +

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

AMENDED RETURNS

\$219

TRUST RETURNS

Discuss Fees with Preparer

\_\_\_\_\_ Our fee is based on the time required at standard billing rates plus out-of-pocket expenses. Invoices are due and payable upon completion of return. All tax preparation fees must be paid prior to the filing of the return. We are not able to deduct fees owed to TaxLogix from any refund due you by the IRS.

\_\_\_\_\_ As previously stated, our engagement to prepare your 2021 tax return(s) will conclude with delivery of the completed return(s) to you (if paper filing) or your signature and our subsequent submittal of your tax return (if e-filing). At times, you the taxpayer, will receive notifications from the IRS that will require your attention. It is often necessary to contact the IRS directly to resolve any issues. TaxLogix tax preparation fees do not include having our tax professionals call the IRS on your behalf. A TaxLogix tax professional is more than willing to guide you regarding the information that you will likely need when calling the IRS. If you prefer for one of our tax professionals to contact the IRS on your behalf, the appropriate authorization will need to be secured. This service will be billed at \$30.00 per hour.

\_\_\_\_\_ Occasionally, clients request that our tax preparers conduct tax planning or modeling various scenarios for tax outcome. This service, depending on complexity and time required, may be billed an additional charge. This charge will be determined by the tax professional.

Estimated Cost of Return: \_\_\_\_\_  
Estimation Will Be Provided by Tax Preparer Prior to Beginning Work on Return

Your Tax Professional is: \_\_\_\_\_

I have read and agree to the terms of the engagement with TaxLogix in completing my 2021 income tax return(s).

Client Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Print Name: \_\_\_\_\_

Client Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Print Name: \_\_\_\_\_



CONSENT FOR USE OF TAX RETURN INFORMATION  
TAX YEAR 2021

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](mailto:complaints@treas.gov).

# YOUR 2021

## TAX PREP CHECKLIST



**TAXLogix**  
HOLISTIC TAX PREP SERVICE

### PERSONAL INFORMATION

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- |   |   |
|---|---|
| <input type="checkbox"/> Social Security Number/Tax ID for Client and Spouse                    | <input type="checkbox"/> New Clients  |
| <input type="checkbox"/> Full Names and Birth Dates for All Individuals Included on Your Return | <input type="checkbox"/> Tax Returns for Previous 2 Years                     |
| <input type="checkbox"/> Information Related to Child Tax Credits Received During 2021          | <input type="checkbox"/> Spouse's Full Name, SSN, and/or Tax ID Number        |
|   | <input type="checkbox"/> All Stimulus Payments Received by All Family Members |

### DEPENDENT INFORMATION

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- |  |  |
|--|--|
| <input type="checkbox"/> Dates of Birth/SSN – Each Dependent | <input type="checkbox"/> Income of Other Adults in Household |
| <input type="checkbox"/> Childcare Records/Costs             | <input type="checkbox"/> Individual Form 8382                |

### SOURCES OF INCOME

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

### DEDUCTION INFORMATION

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- |   |   |
|---|---|
| <input type="checkbox"/> Child and Dependent Care Expenses  | <input type="checkbox"/> Educator Expenses/K12  |
| <input type="checkbox"/> Home Purchase or Refinance (HUD1 Statement)  | <input type="checkbox"/> Post-Secondary Education Expenses  |
| <input type="checkbox"/> Medical Expenses and Health Insurance  | <input type="checkbox"/> Depreciation Expenses Business or Rental   |
| <input type="checkbox"/> Home Ownership – Form 1098, Real Estate Taxes, Property Tax Records, Receipts for Receipts for Energy Saving Improvements, Other Home Improvements, All 1098 Series Forms, | <input type="checkbox"/> 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) |
| <input type="checkbox"/> Health Savings Contributions or Withdrawals (HSA) Form 1095 A,B,C if Applicable  | <input type="checkbox"/> Taxes Paid - Cancelled Check or Statements for Property Taxes Paid or for Estimated Taxes (Federal, State, and Local)  |