



# Disclosure Sheet

## “Engagement Agreement”

Dear Client:

We appreciate the opportunity of working with you and advising you regarding your income tax. To ensure a complete understanding between us, we are setting forth the pertinent information about the services that we will perform on your behalf.

By signing this document I acknowledge that all information in my 2016 federal and state tax return that include, but not limited to my earned and unearned income, expenses, deductions, dependents, and other information is true and accurate to my knowledge. This letter will serve as our agreement in this matter and we ask that you carefully review the letter and sign to confirm all of the information contained within.

It is your responsibility to provide us with all the information needed to prepare complete and accurate tax returns. We will not or otherwise verify the data you submit, although we might ask you to clarify some of the data. If in the event that you supply us verbally with any tax information, by signing this letter you are confirming that the information provided is true and correct to the best of your knowledge.

*For those clients who are claiming the Earned Income Tax Credit, Due Diligence Requirements from the tax preparer on the Earned Income Credit Worksheet, I acknowledge that all information regarding any dependents that allows me to qualify for the EITC credit is true and correct to the best of my knowledge.*

### Qualifying Children for EITC

**1. Relationship** – The person must be related to you in some way. They can be your:

- Son, daughter, stepchild, eligible foster child, adopted child, or a descendant of any of them (e.g. your grandchild)
- Brother, sister, half brother, half sister, stepbrother, stepsister, or a descendant of any of them (e.g. your niece or nephew)

**2. Age** – The person can be either:

- Under age 19 at the end of the year – if you file a joint return, they must be younger than either you or your spouse
- A full-time student under age 24 at the end of the year – if you file a joint return, they must be younger than either you or your spouse
- Permanently and totally disabled at any time during the year, regardless of age

**3. Residency** – The person must have lived with you for at least half the year.

**4. Joint return** – You cannot claim anyone as a qualifying child who is filing a joint return. You can, however, claim someone as a qualifying child who is filing as married filing separately or any other filing status.

A person cannot be claimed as a qualifying child by more than one person. If this is a situation you think you will encounter, the IRS has provided [tiebreaker rules](#).

**I understand that this information is being provided to the IRS and State Revenue. I have been advised by my tax preparer that any false and misleading information that I provide for income tax filing purposes is against the law and are subject to penalties.**



**I understand that Xpert Tax Service is only liable for any Error and Omission on their part and will be responsible for any interest and penalties and not tax due.**

As you know, tax returns are subject to examination by various taxing authorities at both the state and federal levels. In the event of an examination or audit, you may be requested to produce supporting documents or records to substantiate the items of income or deductions. If an examination or audit takes place, Xpert Tax Service stands ready to work with you.

Fees for our services will be at our standard rates for tax matters. Our fees for tax preparation are based on the complexity of the return and the number of schedules and forms necessary and required by the taxing authorities to complete an accurate return. Our invoices are due and payable on presentation. The only exception to fees not being due on presentation is if the taxpayer chooses to select payment to be deducted from refund. *If refund is offset for any reason, the balance is still due and you will be billed for payment, which will be due immediately.*

As your Tax Preparer, we collect information provided by you from your tax organizer, worksheets, documents, discussions, and information that we develop as part of the engagement. We are required to keep all information about our engagement confidential so we will not make any disclosure about you unless we have your approval or are required/permitted by law. This applies even if you are no longer a client. We are committed to safekeeping of your confidential information and we maintain physical, electronic, and procedural safeguards to protect it.

By signing this letter, you authorize us to communicate with you regarding any and all products which we offer via phone, email, fax, and/or letter format. If you choose not to be contacted please call us at (706) 507-1768 "Columbus" or (404) 549-3151 "Stone Mountain".

If the terms outlined in this letter are agreeable with you, please sign a copy of the letter.

We appreciate the opportunity to be of service to you and look forward to working with you and on your behalf. If you should have any questions or need additional information, please do not hesitate to call.

Sincerely,

Accepted:

Taxpayer Printed Name: \_\_\_\_\_

Taxpayer Signature: \_\_\_\_\_

Spouse Printed Name: \_\_\_\_\_

Spouse Signature: \_\_\_\_\_

\_\_\_\_\_  
Date

**Acknowledgement of Return**

**(Initial):**\_\_\_\_\_ I have received a copy of my 2016 tax return. I understand that I will have to pay a \$5.00 fee for any additional copies.