



Dear client:

Thank you for choosing EPL Tax Group, LLC to assist you with your taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will review your current federal and state income tax returns. We will depend on you to provide the information we need to complete an accurate assessment and provide recommendations. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. Review or revision of prior year(s) returns is also available at an additional charge.

We will perform services only as needed to review, revise or prepare your tax returns. Our work will not include procedures to find misappropriated funds 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, of course, inform you of any material errors, fraud, or other illegal acts we discover.

The law imposes penalties when taxpayers underestimate their tax liability. Please 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 will be based on the quote provided at the time of preparation. All preparation fees must be paid before your returns are filed, there are no refunds.

We will return your original records to you at the end of this engagement as an electronically scanned .pdf format and will shred the copies you've sent us physically, if any. You will be able to download these from your Intuit portal account. You should securely store these records, along with all supporting documents, canceled checks, etc., as these items may later be needed to prove accuracy and completeness of a return. We will 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 tax returns will conclude with the delivery of our analysis of your return along with any recommended clarifications or corrections. 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.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign the enclosed copy of this letter in the space indicated.

Signed & Dated: _____

Please provide the following information needed to prepare your tax return

What is your current mailing address? _____

What is the best phone number to reach you? _____

Did your marital status change before the end of last year? _____

If we do not already have this information, please confirm the full legal name(s), social security number, and birthdates for any dependents, and how many months they lived in the home. _____

Do you have a shared custody agreement, or trade off years claiming children or other dependents? If so please indicate which dependents you will and will not claim for this year. _____

If we do not already have this information, please provide your Drivers License(s) info (if married, please provide your spouses info as well): ID#, State, Issue and Expiration dates, or upload a photo with your documents. _____

Please provide the occupation for both taxpayer and spouse. For single income families, it is common for the spouse to be entered as "Homemaker" _____

Have you been issued an identity theft pin number (IP PIN) by the IRS? If yes, please provide the number and upload the IRS letter. _____

If you anticipate receiving a refund and would like to have it directly deposited, please provide your Bank Name, Routing Number and Account Number. _____

If you are entitled to a refund, would you prefer to apply it to your tax balance for the following year? _____

If you end up owing taxes and would like to have it directly debited from your bank account, please provide your Bank Name, Routing Number and Account Number. _____

Did you receive the third economic stimulus payment of \$1400 per person? If that amount was reduced please enter the amount you received, or upload your IRS letter stating your economic recovery amount. _____

Did you receive advanced child tax credits? If so please enter the amount, or upload your IRS letter with the total amount of your payment. _____

Did you have any daycare or dependent care expenses? Please include care provider's name, address, SSN/EIN, and total amount paid to care provider. _____

Have you ever had any of the following credits disallowed: Earned Income Credit (EIC), Child Tax Credit (CTC), Additional Child Tax Credit (ACTC) or Credit for Other Dependents (ODC) (Answer Yes, No, N/A) _____

Did you donate money, clothes, cars, or stock? If so, please provide the organization and total amount donated, and upload any supporting documents. _____

Did you make a contribution to an HSA, IRA, SEP or SIMPLE account outside of your paycheck or W2 during the year, if so what type of account and how much? _____

Did you live in, or receive income from a state that is not your primary address? _____

Please provide your out-of-pocket medical expenses, including amounts paid to doctors, hospitals/clinics, prescriptions and devices (such as eye glasses). _____

Did you make any estimated tax payments? If so please provide the amounts and dates of the payments for both the IRS and your state(s). _____

Did you make any alimony or spousal support payments, if so provide the amount, legal date of separation or divorce, and information on the person paid. _____

In 2021, did you or your Spouse/Dependents receive, sell, dispose, send, exchange or acquire interest in any virtual currency (ie. Bitcoin, Ethereum, Dogecoin)? If yes, please provide details. _____

Did you start a new business this year, or receive any side income? If so please describe the activity and upload any 1099 Misc or NEC in the documents tab. _____

Please provide the following information needed to prepare your tax return

Do you have a 401k or retirement plan you need to roll over? EPL Is a Fee-Only Fiduciary investor, holding assets at Schwab and TDAM. Would you like to schedule a free consultation? _____

Did you or are you planning on selling any real estate? EPL Realty Group is a licensed real estate group in the state of Arizona with over 20 years of experience. Would you like to schedule a free consultation? _____

Would you be interested in a consultation on establishing a trust? _____

Please list any questions or other concerns you might have. _____