

Byrd Accounting  
www.byrdaccounting.biz  
407-656-5400

Welcome Business Client!

Business Name: \_\_\_\_\_

DBA: \_\_\_\_\_

EIN Number: \_\_\_\_\_

Mailing Address:

Physical Location if different:

_____	_____
_____	_____
_____	_____

Type of business organization: Sole Proprietor, Partnership, S Corporation, Corporation

LLC ( Sole Proprietor, Partnership, S corporation)

Company Contact Person: \_\_\_\_\_

Best Number to Reach contact: \_\_\_\_\_

Best email for contact: \_\_\_\_\_

Other officers or members of company:

\_\_\_\_\_

\_\_\_\_\_

Quickbooks:

Version: \_\_\_\_\_

Year \_\_\_\_\_

QBO: User name: \_\_\_\_\_

PW \_\_\_\_\_

- YES NO Copy of previous years tax return, including depreciation schedule.
- YES NO Did the corporation have a change of business name or address during the year?
- YES NO Were there any changes in business activity or product or service?
- YES NO Does the corporation file under a calendar year?
- YES NO Does the corporation satisfy the following conditions?  
The corporation's total receipts for the tax year were less than \$250,000, and  
The corporation's total assets at the end of the tax year were less than \$250,000.
- YES NO Did the corporation pay \$600 or more of nonemployee compensation to any individual?  
If yes, include a copy of the Form 1099 Misc or a list with names, addresses, social security numbers and amounts so we can prepare the 1099M.
- YES NO Any change in principal shareholders?  
If so please provide.
- YES NO Did you make any large equipment purchases during the year?  
If so please provide a copy of the receipt.
- YES NO Did you dispose of any large business equipment this year?  
If so, please provide a list.
- YES NO Did the corporation report tip income on W-2 forms?
- YES NO Did the business use a third party payroll service?  
If so please provide a copy of quarterly returns.

**General Engagement Letter for Corporation Tax Preparation**  
2018

This letter is to inform you, the corporation and corporation representative (taxpayer), of the services we will provide you, and the responsibilities you have for preparation of your tax return.

**Tax Return Preparation**

- . We will prepare your 2018 Corporate Tax Return and State if applicable, 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 books or records. In the event your return is audited, you will be responsible for verifying the items reported.
- . The tax return preparation fee does NOT include bookkeeping. Additional fees apply for these services.
- . Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
- . Preparation fees do cover limited assistance and consultation during the year.
- . The engagement to prepare your 2018 tax returns 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. You may be assessed a fee if you request a copy in the future.

**Taxpayer Responsibilities**

- . You agree to provide us with a trial balance and other supporting data necessary to prepare your tax returns. If you receive additional information after we begin working on your return, you should contact us immediately to ensure your completed tax returns contain all relevant information.
- . You affirm that all income, 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 documentation.
- . 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.
- . You must review the return carefully before signing to make sure the information is correct.
- . 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. A retainer may be required for preparation of returns.

**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.

\_\_\_\_\_  
Corporate Name

\_\_\_\_\_  
Name of Corporate Representative

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

**Privacy 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 express permission, 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 contact us with any questions regarding our privacy policy.