



Client Information Sheet & Agreement for Services

Tax Year: _____

Please Print

Taxpayer **Spouse**

Name _____	Name _____
SSN _____	SSN _____
Date of Birth _____	Date of Birth _____
Occupation _____	Occupation _____
Phone _____ <input type="checkbox"/> Cell Phone	Phone _____ <input type="checkbox"/> Cell Phone
Email _____	Email _____

Marital status: ☐ Married ☐ Never Married ☐ Divorced ☐ Widowed ☐ Separated

Who to contact for questions _____ Best method of contact _____
We may contact Taxpayer by phone, fax, mail, text, and/or e-mail regarding questions of tax return items, tax updates, and general correspondence. Please let us know if you wish to opt-out of text or email.

Address _____ ☐ Own (or buying) ☐ Renting ☐ Other
 _____ School district _____

Check box if you live outside of the U.S. at any time during the tax year: ☐

New clients: How did you hear about us? ☐ Referred by _____ ☐ Other _____

Please complete this section if you have dependents. Do not include spouse.							
Dependent Information	SSN (If new)	Date of Birth	Check if:			Relationship (son, daughter, grandchild, etc.)	Months in Your Home
Full Name (as shown on Social Security Card)			Disabled	Student	Married		

For additional dependents, please check here ☐ and complete additional page for dependent information.

☐ **Yes** ☐ **No** Can you provide documentation for all dependents to prove months in home?

☐ **Yes** ☐ **No** Did you ever receive an **IRS Letter** disallowing or reducing credits in any prior year?

☐ **Yes*** ☐ **No** Did anyone else live in your home during the tax year besides you and the dependents listed?

***If Yes**, did they have more income than you? ☐ **Yes** ☐ **No**

☐ **Yes** ☐ **No** Did you get health insurance through the **marketplace (Obamacare)** at any time during the year, or did you receive a form **1095-A**?

☐ **Yes** ☐ **No** At any time during the tax year, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a **foreign** country?

☐ **Yes** ☐ **No** During the tax year, did you receive a distribution from a **foreign** trust, or were you the grantor of, or transferor to a **foreign** trust?

☐ **Yes** ☐ **No** Did you own any **digital currency**—also known as crypto currency (Bitcoin, Litecoin, etc.)—in the tax year?

☐ **Yes*** ☐ **No** Do you owe **use tax**? Use tax is due on catalog, telephone, or Internet purchases made from out-of-state sellers as well as purchases while traveling in foreign countries when the items are to be brought into the state. Use tax must be paid on the total price unless tax was paid at the time of sale.

***If Yes**, do you have your purchase totals for the year? ☐ **Yes** ☐ **No**

☐ **Yes** ☐ **No** Have you ever worked for an employer that did not withhold FICA (Social Security and Medicare) Tax?

☐ **Yes** ☐ **No** Did you make **energy efficient** home improvements (windows, furnace, insulation, etc.) in **2018 or 2019**?

☐ **Yes *** ☐ **No** Did you or your spouse live or work in a City with a City Income Tax?

***If yes**, please specify which City/Cities _____

☐ **Yes** ☐ **No** New clients: Do you have a copy of your last tax return?

Tax Refund Method

☐ Check in mail or ☐ Direct Deposit to: ☐ Checking or ☐ Savings Bank name _____
If new or changed from last year: Routing # _____ Acct # _____

Payment for services No return will be released without payment in full

☐ Cash/Check/Card (Visa or MasterCard) or ☐ Deducted from refund (Extra fees apply)

Release of return (if not picked up by you or spouse)

I/we give _____ (name) permission to pick up tax documents and/or returns on my behalf. *No tax return information will be disclosed to any person for any purpose not specifically allowed by law or by subsequent approval from Taxpayer.*

Our **Platinum Protection Promise** is included in every individual return we prepare so we can better serve you and increase your peace of mind.

Platinum Protection Includes*:

- ✓ IRS & State Letter Review—letter response and advisement on need for IRS/ State Representation
- ✓ 2 Additional copies of your income tax return
- ✓ W-4 (withholding) review--“Set your own refund” program
- ✓ Tax planning (up to 1/2 hour) --so there are no surprises with your current tax situation.
- ✓ IRS communications copied to office for prompt response and verification of authenticity.
- ✓ Notary Service (up to 5 per year)

**We want to encourage you to use these services—
call us/stop by with any questions/correspondence from the IRS/state.**

*For businesses, there is an additional fee for these services.

Agreement for Tax Services

This agreement is between Integrity Tax Group (hereinafter known as Integrity, we, us) and Taxpayer and Spouse shown on previous page (hereinafter known as Taxpayer, you, your). Integrity and Taxpayer agree to the following:

- 1.) Taxpayer has engaged Integrity to prepare their Federal and State (and city if applicable) income tax returns for the year stated on the previous page. (Current tax year assumed if left blank.) In doing so, you are telling us that you have received all your tax information (W-2s, 1099s, K-1s, etc.) and that your tax return is ready to be filed. If you receive additional information after we file your return, this document is your official notification that should you request our services in filing the required amended return; we will be charging you an additional minimum \$100 fee for services rendered. All returns eligible for electronic filing will be filed electronically.
- 2.) Integrity fees are not based upon your income or your tax refund. Fees are based on the forms needed to complete your return with a minimum return charge. Taxpayer agrees to pay for the services performed before the release of completed returns. No return will be released, nor signed 8879 accepted, without payment in full. Integrity accepts cash, check, Visa, and Mastercard. Or, Integrity's fees can be taken out of your refund for an additional charge through EPS Financial. There will be a minimum \$25 service fee on all returned checks, up to the maximum allowable by state law.
- 3.) If Integrity makes an error, we will correct the error at no additional charge. If our error results in a penalty or interest, we will try to have the penalty abated, and if not successful, we will pay the penalty and interest. A written Penalty Abatement Denial Letter is required to be received from the IRS before a check for penalty and interest can be written. Exception to us paying penalty & Interest is allowed when a taxpayer shows a history of non-compliance with the IRS within the past 3 years. In this circumstance, if the IRS declines abatement, Integrity also reserves the right to decline reimbursement. In all circumstances, taxpayer is responsible for any additional tax that may be due.
- 4.) We will file an extension of time to file with the IRS if your return is not completed and filed before the due date. Please note, an extension is only for time to file. Payments are still due by the original due date. We cannot guarantee completion of your return by Tax Day if we receive your information in April. However, we will do our best. This will also apply to returns started before April, under extenuating circumstances.
- 5.) Tax returns are subject to review by taxing authorities. Should an examination of Taxpayer's return occur, Integrity would be available to represent you or consult with you. Depending on the circumstances and scope of work involved, there may be an additional fee.
- 6.) Taxpayer understands Integrity is not engaged to and will not audit or otherwise verify any information; that we may require clarification; that we are not responsible for disallowed deductions, or the inclusion of additional unreported income or any resulting taxes, penalties, or interest.

If the terms of this agreement, as outlined above, are in accordance with your understanding of our engagement, please sign in the space provided. **Both parties should sign for preparation of a joint return.**

Taxpayer

Date

Spouse

Date