



Entity Information Sheet & Agreement for Services

Tax Year(s): _____

Business/Entity Name _____ DBA _____

Address _____

Primary contact name _____ Phone _____

Email _____ Best method of contact _____

We may contact Primary Contact 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.

QuickBooks Password (If a file has been provided) _____

Note: We can only open 2017-2019 QuickBooks Files—if your file is from a version older than this, please provide a printed Profit & Loss Statement and a Balance Sheet as of 12/31 (or Year End if Fiscal Year)

For QBO: Please add QBO@integritytaxgroup.com as a user.

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

☐ Cash/Check/Card (Visa or MasterCard)

☐ I am a year-round bookkeeping client and pay for my return via ACH (Integrity will verify prior to release)

Release of Return (after payment) ☐ Will pick up ☐ Mail back ☐ Online Portal

☐ I give _____ 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.

Additional questions for new clients: Do you have a copy of your last tax return? ☐ Yes ☐ No

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

EIN _____ Date Business Formed _____

Product or Service _____ Business Code _____

Accounting Method ☐ Cash ☐ Accrual ☐ Other (specify) _____

Type of Entity (Select all that apply): ☐ LLC ☐ Partnership ☐ S-Corporation ☐ C Corporation

☐ Non-Profit ☐ Trust ☐ Estate ☐ HOA ☐ Other _____

Date of Entity Election _____ Number of shareholders/partners at the end of the year _____
(Please provide a copy of names, addresses, ID#s and % ownership)

Initials: _____

Agreement for Tax Services

Thank you for choosing Integrity Tax Group (hereinafter known as Integrity) to assist with the taxes for your company_____ or named on the preceding page (hereinafter known as you, your company) for years indicated in the succeeding paragraph. This letter confirms the terms of our engagement and outlines the nature and extent of services we will provide.

We will prepare the Federal and State (and city, if applicable) income tax returns for the year(s) stated on the previous page. We will depend on management to provide the information we need to prepare complete and accurate returns. We will ask management to clarify some items but will not audit or otherwise verify the data submitted. A bookkeeping fee may be charge in addition to tax preparation fees if the books are not balanced.

We will perform accounting services only as needed to prepare the 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 management to clarify some of the information submitted. We will, of course, inform management of any material errors, fraud, or other illegal acts we discover.

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 the behalf of your company, the alternative selected by management.

Our fee will be based on the complexity of the return. Invoices are due and payable upon presentation. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (30) days.

We will return the original records to management at the end of this engagement. These records, along with all supporting documents, cancelled checks, etc. should be securely stored, as these items may later be needed to prove accuracy and completeness of a return. We will retain copies of the records and our work papers for the engagement for seven years, after which these documents may be destroyed.

Our engagement to prepare the tax returns for the years indicated will conclude with the signing by the person responsible for tax matters for the entity, and the subsequent submittal, of the tax return (e-filing). If you have selected not to e-file the returns with our office or the return is not eligible for e-filing, you will be solely responsible to file the returns with the appropriate taxing authorities. The individual responsible for tax matters should review all tax return documents carefully before signing them.

To affirm that this letter correctly summarizes the arrangements for this work, please sign the space indicated below. We appreciate your confidence in us. Please ask us if you have questions.

Accepted by:

Full name of person responsible for tax matters

Title

Signature of person named above

Date