



Arlene D. Anderson, EA  
Susan L. Gilbert, CPA

Subject: Preparation of 2019 Tax Returns

This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide. We will prepare your 2019 federal and state income tax returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit.

We will perform accounting services only as needed or requested by you to prepare your tax 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 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 time required at standard billing rates plus out-of-pocket expenses. **If you later decide to take your information back, we will charge the greater of \$75 or actual costs to cover our expenses.** Invoices are due and payable upon presentation.

We will return your original records to you at the end of this engagement. 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 electronic copies of your records and our work papers for your engagement for seven years, after which these documents will be destroyed.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign this letter in the space indicated and return it to us. For insurance purposes, we cannot begin working on your tax information until we have a signed engagement letter.

We appreciate your confidence in us. Please call (603)357-1928 if you have questions.

Sincerely,  
ANDERSON & GILBERT INC

Accepted By: **(Both taxpayer and spouse must sign for preparation of joint returns.)**

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

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

\_\_\_\_\_  
Date Telephone Number

\_\_\_\_\_  
Date Telephone Number

CONTACT INFORMATION FOR BEST PERSON TO ANSWER QUESTIONS	
BEST PERSON TO CONTACT	
PHONE #	
E-MAIL ADDRESS	
DRIVER'S LICENSES	PROVIDE <u>COPY</u> FOR TAXPAYER & SPOUSE (IF APPLICABLE)

**Did you and your dependents have Health Insurance in 2019?** \_\_\_\_\_

**If YES, Provide Form 1095-A, if through the Market Place. Provide Form 1095-B and/or 1095-C if through an employer or government agency.**

**DURING 2019 DID YOU RECEIVE, SELL, EXCHANGE OR OTHERWISE ACQUIRE ANY FINANCIAL**

**INTEREST IN ANY VIRTUAL CURRENCY? YES  NO**



295 Park Avenue ♦ Keene, NH 03431 ♦ tel. (603) 357-1928 ♦ fax (603) 357-5024  
[reception@agtaxfolks.com](mailto:reception@agtaxfolks.com) or [customerservice@agtaxfolks.com](mailto:customerservice@agtaxfolks.com)

**NEW CLIENTS - Please provide a copy of your prior year tax return and complete the information below.**

	TAXPAYER	SPOUSE
NAME		
SSN		
DOB		
OCCUPATION		
ADDRESS		

**LIST ALL CHILDREN & OTHER DEPENDENTS**

NAME	SSN	DOB	RELATIONSHIP	STUDENT?
				YES <input type="checkbox"/> NO <input type="checkbox"/>
				YES <input type="checkbox"/> NO <input type="checkbox"/>
				YES <input type="checkbox"/> NO <input type="checkbox"/>

**RETURNING CLIENTS - please provide information on any changes in your situation.**

(births, deaths, job changes, marriages, divorces, address or phone number changes) or Comments for 2019.


**CORPORATIONS, PARTNERSHIPS & SOLE PROPRIETORS - Please provide the following information.**

Bank statements for 2019  
 Credit card statements for 2019  
 Quickbooks accountant's copy  
 Quicken back up copy  
 Invoices for asset purchases over \$200

Depreciation schedule for all assets  
 Loan documents new and year end  
 Any changes in ownership  
 List new members  
 Non-profits complete 990 questionnaire