

Personalized Accounting  
3236 S US Highway 51  
Janesville, WI 53546

**Dear Client:**

We appreciate the opportunity to work with you. To minimize the possibility of a misunderstanding between us, we are setting forth pertinent information about the services we will perform for you.

We will prepare your 2021 Federal & State income tax return from the information you furnish us. We do not use foreign third parties for preparation of your tax return, but we may use outside processing companies for electronic filing and backup storage purposes. We will not audit or otherwise verify the data you submit although we may ask you to clarify some of the information. We may furnish you with tax organizers and questionnaires to help you gather and organize the necessary information for us, in order to keep our fee to a minimum. It is your responsibility to maintain your records, the documentation necessary to support the data used in preparing your tax return.

New Privacy laws were established by the IRS effective January 01, 2009, we are now prohibited from providing confidential information or copies to anyone other than you without your written authorization.

New privacy laws effective January 01, 2011 prohibit us from using your tax information for any of the following uses without your written consent: tax preparation, investment advice or tax planning. Your signature on this letter constitutes your written consent to use tax information to do your tax return, give investment advice, or do tax planning.

We appreciate the opportunity to serve you. Please date and sign the enclosed copy of this letter to acknowledge your agreement with and acceptance of your responsibilities and terms of this engagement. It is our policy to initiate services after we receive the expected engagement letter.

**By signing this you agree that the information provided to us to prepare your 2021 tax return is accurate and true.**

Sincerely Yours,

Staff at Personalized Accounting

I have read the above terms of this engagement letter and agree with the terms of this engagement

**\*\* Did you receive unemployment in 2021? \_\_\_\_ YES \_\_\_\_ NO (If yes 1099 is needed)**

**\*\*What was the amount of the third round of stimulus payment you received in 2021? \$ \_\_\_\_\_**

**\*\* Did you receive any monthly advances of the child tax credit? \_\_\_\_ Yes \_\_\_\_ No \_\_\_\_ N/A**

**\*\*Did you have Marketplace/Obamacare health insurance in 2021? \_\_\_\_ YES \_\_\_\_ NO (If yes 1095A is needed)**

**\*\* How much rent (if any) did you pay in 2021? \$ \_\_\_\_\_**

**\*\* Is your 2021 Property tax bill included? \_\_\_\_ YES \_\_\_\_ NO**

**Client Signature \_\_\_\_\_ Date \_\_\_\_\_**

**\*\*\*Please provide updated contact information**

**Phone # \_\_\_\_\_ E-mail Address \_\_\_\_\_**