T&J Tax and Accounting Services

Trusted Accountants since 2010

Thomas J. Bopp, CPA P.C.
Tax Accountant

We would like to thank you for choosing T&J Tax and Accounting Services for your tax preparation needs. We are giving you a New Client Packet. You will find this packet contains:

1. Tax Questions – Please, fill this out as completely as possible. Please bring this packet with you to your appointment.
2. Tax Information Checklist
3. Engagement Letter (a 2-sided page) – This letter is the contract between you and T&J Tax and Accounting Services for tax preparation services. Please, read and both Taxpayer and Spouse (if applicable) sign and date.
4. Audit Protection Plan – This will explain the different Audit Protection Plans we offer.
5. Client Disclosure Agreement Form – This form is for you to pick one of our Audit Protection Plans or if you would like to opt out. Please, check the appropriate box and both Taxpayer and Spouse (if applicable) sign and date.
6. Privacy Policy – This is for you to keep for your information. It explains how we use information you provide us.

Please, bring this packet with you to your appointment, along with the last 3 years of tax returns, Driver's License or State Issued Identification Card for Taxpayer and Spouse, Social Security Cards for every person on the tax return, Birth Certificates for all dependents, any tax documentation (W2's, 1099's, etc.), and a list of any question you may have. We look forward to seeing you on

(Appointment Date) ______________________________ @ (Appointment Time) __________________

Very Respectfully,

Thomas J. Bopp, CPA P.C.
T&J Tax and Accounting Services
Owner / Tax Accountant

T&J Tax and Accounting Services

Tax Information Checklist

To assist us in finding every allowable deduction and credit you are entitled to, use the following list to help you organize your tax documents and information. Then send or bring them to us, along with your completed ***Tax Questionnaire***.

- Driver's License(s)
- Social Security Card(s)
- Dependent's Social Security Card(s) and Dates of Birth
- Form W-2 (Wage Statement)
- Form 1444 (Economic Stimulus Payment)
- Form 1099-MISC (Self-Employment Business or Farm Income and Expenses)
- Form 1099-R (Pension and Retirement Income)
- Form 1099-INT (Interest Income)
- Form 1099-DIV (Dividend Income)
- Form 1099-G (State Income Tax Refund)
- Form 1099-G (Unemployment Income)
- Form 1099-B (Sales of Stocks or Bonds) (Include dates and purchase price and sale price of stocks and bonds)
- Form SSA-1099 (Social Security Income)
- Form W-2G (Lottery or Gambling Winnings)
- Schedule K-1 (Income from Partnerships, S-Corporations, Trusts, and Estates)
- Income and Expenses from Rentals
- Alimony Paid or Received
- Commission Received
- Commission Paid
- Lottery or Gambling Losses
- IRA Contributions
- Form 1098 (Mortgage or Home Equity Loan Interest Paid)
- Real Estate and Personal Property Taxes Paid
- Record of Purchase or Sale of Real Residence
- Casualty or Theft Losses
- Child Care Expenses and Provider Information
- Medical, Eye Care, and Dental Expenses
- Cash and Non-Cash Charitable Donations
- Form 1098-T (Tuition and Education Fees)
- Form 1099-E (Student Loan Interest)
- Educator Expenses (For Teachers)
- Estimated Taxes Paid
- Foreign Taxes Paid
- Copy of Last Year's Federal and State Tax Return (If available)

T&J TAX AND ACCOUNTING SERVICES
Tax Questionnaire

Income Tax Preparation Client Information Questionnaire

INSTRUCTIONS: Answer All questions with an answer or a N/A. For Joint Filings, put a "T" before taxpayer's information and an "S" before spouse's information. Today's date ______________________ If more space is needed, use the space below or attach blank pages.

SECTION 1	**PERSONAL INFORMATION**	
Taxpayer's First Name	MI	Last
Social Security Number	_____ _____ _____ - _____ _____ - _____ _____ _____ _____	
Marital Status: □Single □Married □Separated □Divorced □Widow		
Street Address		Apt#
City	State	Zip
Home Phone	Work Phone	
Blind: Yes No	Date of Birth: month _____________day ________ year _______	
Occupation	$3 to Presidential Campaign Fund □Yes □No	
Can you be claimed as a dependent on another's return □Yes □No		
Spouse's First Name	MI	Last
Social Security Number	_____ _____ _____ - _____ _____ - _____ _____ _____ _____	
Street Address		Apt#
City	State	Zip
Home Phone	Work Phone	
Blind: Yes No	Date of Birth: month ______________day _______ year _______	
Occupation	$3 to Presidential Campaign Fund □Yes □No	
Can you be claimed as a dependent on another's return Yes No		

SECTION 2	**FILING STATUS (THIS SECTION IS FOR THE TAX PREPARER)**
□Single (Never married, unmarried as of December 31, 2020, or legally separated)	
□Married Filing Jointly (Married as of December 31, 2020)	
□Married Filing Separately	Spouse's Name and SS#
□Head of Household (Leave blank if you do not know if you qualify)	

□Qualifying Widow(er) (Leave blank if you do not know if you qualify)	
Did your spouse die in 2017, 2018 or 2019 □Yes □No	If so, did you remarry □Yes □No

SECTION 3

DEPENDENT INFORMATION

1st Dependent's First Name	MI	Last	
Social Security Number	____ ____ ____-____ ____-____ ____ ____ ____		Date of birth
Relationship (son, daughter, etc.)	Dependent's gross income in 2020		
Number of months they lived in your home in 2019		Full-time Student Yes… No…	
2nd Dependent's First Name	MI	Last	
Social Security Number	____ ____ ____-____ ____-____ ____ ____ ____		Date of birth
Relationship (son, daughter, etc.)	Dependent's gross income in 2020		
Number of months they lived in your home in 2019		Full-time Student Yes… No…	
3rd Dependent's First Name	MI	Last	
Social Security Number	____ ____ ____-____ ____-____ ____ ____ ____		Date of birth
Relationship (son, daughter, etc.)	Dependent's gross income in 2020		
Number of months they lived in your home in 2019		Full-time Student Yes… No…	
4th Dependent's First Name	MI	Last	
Social Security Number	____ ____ ____-____ ____-____ ____ ____ ____		Date of birth
Relationship (son, daughter, etc.)	Dependent's gross income in 2020		
Number of months they lived in your home in 2019		Full-time Student Yes… No…	

SECTION 4

INCOME

Do you have any Social Security Benefits? Yes… No… If Yes, Amount: $
Do you have any interest income NOT listed on a 1099INT? Yes… No… If Yes, Amount: $
Do you have any dividends from stocks NOT listed on a 1099DIV? Yes… No… If Yes, Amount: $
Do you have any income from a business you own? Yes… No… If Yes, Amount: $
Did you sell any stocks or bonds in 2020? Yes… No… If Yes, Amount: $
Did you have any rental income from property you owned? Yes… No… If Yes, Amount: $
Any other income such as prizes, gambling winnings, jury duty, etc.? Yes… No… If Yes, Amount: $

SECTION 5 DEDUCTIONS	
Do you have any childcare expenses? Yes… No… If Yes, Amount: $ Name of Care Provider Phone Address Address Employer I D # or Social Security #	
Do you have any student loan interest deductions? Yes… No… If Yes, Amount: $	
Do you have any IRA deductions? Yes… No… If Yes, Amount: $	
Did you pay interest and property taxes on your home? Yes… No… If Yes, Amount: $	
Did you pay any alimony? Yes… No… If Yes, Amount: $	
Did you have un-reimbursed medical and dental expenses? Yes… No… If Yes, Amount: $	
Did you move in 2020? No… Yes… How many miles from your old home to your new home:	
SECTION 6 CORONAVIRUS AID, RELIEF & ECONOMIC SECURITY ACT (CARES ACT)	
Did you receive an Economic Impact Payment? □ Yes □ No If Yes, Amount $ _______________	
SECTION 7 GENERAL QUESTIONS	
Are any dependents listed in **SECTION 3** permanently disabled? Yes… No…	
Where you a student at any time during 2020? Yes… No… How long? How much did you pay for tuition, fees, books and other school supplies? If Yes, Amount: $	
Did you file a federal tax return last year? Yes… No…	A state tax return? Yes… No…
Did you itemize your deductions last year? Yes… No…	
*** Items 58,59,60 and 61must be completed:**	
*** Do you owe any back taxes? Yes**… **No**… If Yes, Amount: $	
*** Do you owe any back child support payments?** Yes… No… If Yes, Amount: $	
*** Do you owe any money on a defaulted student loan?** Yes… No… If Yes, Amount: $	
*** Did you receive a federal tax refund last year?** Yes… No… If Yes, Amount: $	
If you are in the following occupations, special deductions may apply: Teacher… Fire fighter… Police… Long haul trucker… Clergy… Actor/ Artist…	
Number of Form W2's attached	Number of Form 1099R attached
Number of Form 1099 INT attached	Number of Form 1099G attached
Number of Form 1099 DIV attached	Number of other Forms attached
SECTION 8 REFUND INFORMATION	
Please prepare the following returns: □Federal □State (Name of state or states):	
Please electronically file the following returns: □Federal □State(s)	

If you are due a refund, how do you want to receive the money? (Check one of the boxes below):

A. □By Refund Anticipation Loan (RAL) (1to 3 Days) **-** Participating bank advances money until refund is received. (Preparation and bank fees are deducted from refund.)

B. □ By Electronic Refund Deposit (8 to 15 Days) – Refunds are deposited into your bank account after preparation and bank fees are deducted. Please provide the following bank account information:

Your Account Number ____

Name on Account ____________________________ Account Type: □Checking □Savings

Bank Routing Transit Number (RTN)_______________________________________ (leave blank if uncertain).
(***Please attach a voided check or deposit slip from your account for verification***)

C. □ By Electronic Refund Checking (7 to 14 Days) – Preparation and bank fees are deducted from refund and a bank check will be available for pick up, at this location or mailed to your home.

D. □ By IRS Direct Deposit to your bank account (12 to 19 Days) – All fees must be paid in advance.

E. □ By check mailed from IRS (19 to 26 Days) – All fees must be paid in advance.

F. □ By check mailed from IRS without electronic filing (6 weeks to 12 weeks) – All fees must be paid in advance.

G. □ Refund to be used as a down payment and deposited into the following business account:
(Name of business):

H. □ No Refund Due – Will pay by Credit or Debit Card: Charge $________ to my card: □VISA □MC □AMEX □DISC

Card # ____ **Expiration Date ___________**

Please complete all blanks exactly as shown on card and on billing statements:

Name _______________________________Address ____________________________________

City ____ State ______ Zip _____________

Telephone ( ) ________________________ Fax ( ) ____________________________

Signature (Required) ____

I (We, if filing Jointly) acknowledge that the above information provided by me is true and accurate to the best of my knowledge. I hereby relieve T&J Tax and Accounting Services, its agents and affiliates, from any liability whatsoever, regarding the preparation of this/ these tax returns, and agree to hold them harmless from any damages I may suffer and understand that my sole relief is limited to the return of any fee paid for the preparation of these tax documents. I (we) guarantee payment of the preparation fee and any related charges.

Primary Taxpayer’s Signature	Date
Print Name	
Spouse’s Signature	Date
Print Name	
Tax Preparer Signature:	Date
Print Name:	

T&J Tax and Accounting Services

Trusted Accountants since 2010

Subject: Preparation of Your 2019 Tax Return

Thank you for choosing T&J Tax and Accounting Services to assist you with your 2019 taxes. 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.

CLIENT WILL:

- Provide complete and accurate information for the preparation of the 2019 Income Tax Returns; including documentation to satisfy requirements for the Affordable Care Act. Unless all required information is available fifteen (15) days prior to the due date, filing an extension may be required.
- Certify that he/she has and will maintain all documentation as required to support the information used in preparing the tax returns including, business expenses which may include usage of vehicles, computers, and cell phones.
- Carefully review the completed income tax return for accuracy before signing and electronic filing them to the taxing authorities.
- Notify the prepare immediately of any corrections or additions to your tax return.
- Notify the prepare immediately of any correspondence received from taxing authorities related to these returns.
- Be responsible for any taxpayer penalties, additional taxes or interest assessed by the taxing authorities.

PREPARER WILL:

- Use professional judgement in providing guidance when the tax law is unclear, or where there may be conflicts between taxing authorities' interpretations of the law and what seem to be other supportable positions. Whenever possible, the preparer will resolve such as questions in the client's favor as long as it is consistent with the Tax Codes, Regulations and Interpretations.
- Prepare the return(s) based on information and unaudited documentation provided by the client. A checklist will be provided to aid the client in organizing this information. Such information will be reviewed if needed, client will be asked for additional documentation or clarification. If needed, bookkeeping services will be rendered at $150 and research may be performed for an additional fee.
- Inform the client about information discovered that affects other tax years. However, the preparer cannot be held responsible for identifying ALL items. Should the client become aware of such information, he/she will contact the preparer to discuss resolution of the issue.
-Prepare and present the completed return(s) for filing and provide the client a copy of the return(s) along with their original information and documentation used in its preparation.
- Treat any information received from the client as confidential and subject to disclose ONLY AT WRITTEN REQUEST of the client as compelled by law. Copies of the completed return(s) will be kept digitally on a secure cloud server. If the client requests additional copies of the return(s) and/or documents, there may be a fee for the service.
- Although anything disclosed by taxpayer during the interview is confidential, the preparer cannot disregard the implications of any information provided during the process of preparing the return. Additionally, there is not attorney-client privilege in the tax returns and the Internal Revenue Service will not be misled in any way.

FEE POLICY:
The fee for these services will be based upon the amount of time required, billed at our standard rate. All fees are due and payable upon presentation. The fee for preparing your income tax return(s) does NOT include responding to tax agency inquiries, representations on your behalf, or subsequent consultations.

CHECK POLICY:

If you are paying your fee by Check, please make check payable to: Thomas Bopp. If a check is returned to our office, the client will be charged a return check fee of $25.00.

AUDIT AND/OR ASSISTANCE POLICY:
The return preparation fee does NOT include services requested after the return is completed in connection with correspondence or audits. However, audit assistance is available on an hourly basis and is billed separately. All income tax returns are subject to examination by the taxing authorities. If this should occur, we will assist you, if you so desire. It is important for you to know that any items resolved against you by the examining agent, such as disallowance of doubtful deductions or inadequate documentation, the resulting taxes, or penalties and interest are ultimately your responsibility although you still have certain rights to appeal to the taxing authority.

RECORDS RETENTION:
Documents related to tax preparation that are left with the preparer will be returned to the taxpayer when the corresponding return is completed and picked up. If the documents are left with the preparer the taxpayer will be notified by telephone call or letter that the documents must be picked up or the preparer will securely keep a digital copy of the documents on our secure cloud server and mail the original copy to the taxpayer.

We sincerely appreciate this opportunity to serve you and look forward to a long and mutually satisfying, professional relationship.

Very Respectfully,
Thomas J. Bopp, CPA P.C.
T&J Tax and Accounting Services

Acceptance:
I have read and hereby accept the foregoing terms and conditions of this agreement.
(Both spouses must sign for preparation of joint returns.)

Accepted By:

____
Print Taxpayer Name

____ ______________________
Sign Taxpayer Name Date

____
Print Spouse Name

____ ______________________
Sign Spouse Name Date

____
Print Preparer Name

____ ______________________
Sign Preparer Name Date

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Client Disclosure Agreement Form

The IRS sent out over **200 million automated notices last year to unsuspecting taxpayers** leveraging technology instead of relying on their own work force. A majority of these notices were downright incorrect that cost taxpayers millions of dollars to defend and prove their "innocence". Your chances of receiving one of these notices questioning items on your return, or stating that you're being audited or informing you that your tax identity was stolen is increasing every year.

It can cost anywhere from $250 to $500 and up just to respond to an uncomplicated IRS/State computer generated notice. Defending an actual audit or having your tax ID stolen can mean real financial stress to your life. Audit representation fees alone can range from $3,500-$10,000 and up. In order to safeguard you from incurring any of these unforeseen expenses, we've created our **Audit Protection Plan.** For just a small fee, you can rest assured-we've got you covered under one of our Plans below:

□ **Basic Plan - $45/yr.** **($225 value)**

- ✓ We'll respond to written notices from the IRS, State, or local tax authorities
- ✓ Certified Mail of All Correspondence & Payment

□ **Silver Plan - $75/yr.** **($3,725 value)**

Includes everything in Basic Plan, PLUS:

- ✓ We'll respond to written notices from the IRS, State, or local tax authorities
- ✓ We'll restore your tax account and any refunds due to Tax Identity Theft. ($750 value)
- ✓ One hour of additional consultation services at no additional charge. ($150 value)

□ **Gold Plan - $125/yr. (Best Value!)** **($4,550+ value)**

Includes everything in Silver Plan, ($3,725 value), PLUS:

- ✓ We'll provide copies of your tax returns upon your request at no charge. ($25 value)
- ✓ 4 planning meetings thru-out the year ($600 value);
- ✓ Priority phone, email and office access;
- ✓ **Individual IRS & State "Worry-Free" Audit Representation. ($2,500 Value)

******We'll waive our hourly Audit fee for up to 10 hours of audit representation.
Additional hours will be billed at our regular rate of $150/hour
(Value = Regular fee: $2,500 retainer + $150/hour).

This protection becomes effective upon filing of your 2019 Form 1040 and generally lasts for 3 years from the date your return was filed.

(Opt-OUT) □ By checking here, I indicate my choice *not* to participate in the **Audit Protection Plan.** I understand that I will be subject to additional charges at $250 if my return is selected for audit, or if I receive notices from a taxing authority questioning items on my return, or if my if my tax identity is stolen or if I need additional services not included with the preparation of my tax return.

________________________________ ____________________

Client Signature Date

T&J Tax and Accounting Services

Trusted Accountants since 2010

Privacy Policy

Your privacy is important to us. Please read the following privacy policy.

We collect nonpublic personal information about you from various sources, including:

- Interviews regarding your tax situation

- Applications, organizers, or other documents that supply such information as your name, address, telephone number, Social Security Number, number of dependents, income, and other tax-related data.

- Tax-related documents you provide that are required for processing tax returns, such as Forms W-2, 1099-R, 1099-INT and 1099-DIV, and stock transactions.

We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as requested by our clients or permitted by law.

We restrict access to personal information concerning you, except to employees who need such information in order to provide products or services to you. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your personal information.

If you have any questions about our privacy policy, please contact us.

Very Respectfully,
Thomas J. Bopp, CPA P.C.
T&J Tax and Accounting Services