TAX CLIENT AGREEMENT

Complete Tax Preparation for individuals for **$200.00** includes:

E -filed personal, single or joint, federal and one state tax return for one tax year.

In order to complete these services, I have been asked to provide certain information. It is my responsibility to make sure the provided information is complete and accurate. The services do not include any verification of the information I provide. It is also my responsibility to maintain records of this information since I may need to satisfy tax authority inquiries.

IMPORTANT

My tax returns will be filed electronically to allow faster processing. My tax returns will only be filed after I have reviewed them and returned the signed e-file authorization forms.

If I bring in new or revised information (e.g.,1099's, W-2 forms, additional deductions, etc) AFTER my taxes have been printed and/or e-filed, I agree to pay Rogers Tax Advisory Group a reprocessing fee of $75 to re-calculate, re-print and/or re-file my return(s).

I understand the electronic filing process and will contact Rogers Tax Advisory Group should I have any questions or changes to my return.

Additional charges:

$100.00	Schedule C or E (each)
$ 40.00	Earned Income Credit (Schedule EIC)
$ 75.00	Additional State Return
$ 25.00	Additional copy of current year tax
$ 25.00	Additional copy of previous year tax return
$ 10.00	Copy of supporting documentation
$ 60.00	Form 8962 Reconciliation of the Premium Tax Credit

Business and Trust Returns - Negotiable

The estimated cost of my return will be ________________________

Client Signature: _______________________________

Print Name: ___________________________________ Date: ___________________

Client Signature: _______________________________

Print Name: ___________________________________ Date: ___________________

PERSONAL DATA SHEET

Name **D.O.B.** **Soc Sec #** **Blind?**

					☐

Spouse Name

					☐

Phone **Email** **How Did You Hear About Us?**

Mailing Address

DEPENDENTS

Name			D.O.B.	Soc. Sec. #	Relationship	Child Care?
						☐
						☐
						☐

REMEMBER TO PROVIDE THE FOLLOWING

- Copy of last year's tax return (unless we prepared your return)
- Any form 1099 reporting income or security sales - include entire statement
- Copy of checks/record for quarterly estimated taxes paid
- Forms 1098 for mortgage interest paid
- SUMMARIZED TOTALS of any medical/dental expenses - DO NOT INCLUDE RECEIPTS
- Records of Charitable Contributions
- Property Tax receipts for Real Estate and personal property
- The HUD 1 statement from any Real Estate transactions pp 1-3 only
- Social Security Statements
- W2 forms for an employment
- 1099 K/NEC/MISC - Self Employment
- College tuition and student loan interest
- Anything received that states "IMPORTANT TAX INFO"

4000 Faber Place Drive, Ste. 300
Charleston, SC 29405
843-552-5444
RogersTaxAdvisoryGroup.com