

Please read the following statements and sign below.

Thank you for trusting ALPHA OMEGA TAX SERVICE LLC to assist with your tax affairs. This letter confirms the terms of our engagement and the nature/extent of services we will provide.

We will prepare your **2020 FEDERAL and STATE** income tax return using information you provide to us. Taxpayer(s) acknowledge that information submitted to ALPHA OMEGA TAX SERVICE LLC to prepare tax return can be substantiated by receipts, canceled checks and other documentations. ALPHA OMEGA TAX SERVICE LLC does not audit or use any procedures to discover defalcation or other irregularities. The only analysis work we will do is that which is necessary for preparation of your income tax returns.

This information provided to ALPHA OMEGA TAX SERVICE LLC is true, accurate and complete to the best of taxpayer(s) knowledge. The law imposes penalties when taxpayers understate their tax liability. If you have concerns about such penalties, please advise us. Taxpayer(s) understand that in the event of an audit, taxpayer(s) are responsible for gathering all necessary information for the audit. ALPHA OMEGA TAX SERVICE LLC is available to represent taxpayer(s) and assist putting such information together for the IRS or any state at the then current rate.

Taxpayer(s) understand they are responsible for their own tax return and hold ALPHA OMEGA TAX SERVICE LLC harmless for any misrepresentation of information that taxpayer(s) have provided to ALPHA OMEGA TAX SERVICE LLC that results in additional tax, interest and/or penalties assessed by the IRS or State.

If a dispute arises out of or related to this engagement or the obligations of the parties therein and if the dispute cannot be settled through negotiation, the parties agree first to try in good faith to settle the dispute by mediation. Disputes between ALPHA OMEGA TAX SERVICE LLC and taxpayer(s) must be filed and handled in Acadia Parish, Louisiana at each party own expense.

Taxpayer(s) have read and accept this engagement agreement with ALPHA OMEGA TAX SERVICE LLC and have reviewed Alpha Omega Tax Service LLC privacy policy. Written authorization must be provided to ALPHA OMEGA TAX SERVICE LLC before any copy or fax of tax return(s) information will be released to any outside party. (Example: mortgage company, financial institutions, educational institutions, etc.)

ALPHA OMEGA TAX SERVICE LLC will provide copy of tax return upon completion and payment. We suggest that you store this in a safe secure place. ALPHA OMEGA TAX SERVICE LLC retains our copies for 3 years. **Request for additional copies are subject to a \$35 fee per year/instance.**

NO TAX RETURN WILL BE FILED UNTIL PAYMENT IS RECEIVED.

Taxpayer Signature _____ Date _____

Spouse Signature _____ Date _____



ALPHA OMEGA TAX SERVICE LLC

1028 N Parkerson Ave #B Crowley, LA 70526

Office 337-250-4240 Text 337-581-9052

Email taxhelp@3taxladies.com

Taxpayer Name	_____	Spouse Name	_____
Taxpayer Occupation	_____	Spouse Occupation	_____
SSN Last 4	_____	SSN Last 4	_____
Taxpayer Cell Phone	_____	Spouse Cell Phone	_____
Taxpayer Email	_____	Spouse Email	_____
Current Address	_____		

Check ALL that Apply for 2020 (include for both taxpayers if filing married joint)

- | | |
|---|---|
| <input type="checkbox"/> <u>Marital status change in 2020?</u> | <input type="checkbox"/> <u>College Tuition Paid/Scholarships Received? (1098T required)</u> |
| <input type="checkbox"/> <u>Adding or Removing Dependents?</u> | <input type="checkbox"/> <u>Was same person enrolled at least half-time?</u> |
| <input type="checkbox"/> <u>I am claimed as a dependent on another tax return</u> | <input type="checkbox"/> <u>Cancelled checks/receipts required for Education Credits</u> |

- W2 Income
- Tip or Other Income
- Unemployment (Must have Tax forms)
- Interest Income
- Self Employed (SE Data Sheet Required)
- Receipt PPP or EIDL
- Hobby Income
- 1099 NEC (Non Employee Compensation) NEW FORM
- 1099 Misc
- Rental Property(E Data Sheet Required)
- Sale of Stock
- K-1's
- Lottery or Gambling Winnings
- Social Security/Railroad Retirement?
- Pension/Retirement Income
- Early Withdrawal from retirement fund(1099R)
- Was Early Withdrawal related to COVID Disaster
- Alimony Paid/Received
- Purchased New Home
- Sold Primary Residence
- Contributed to retirement fund
- Student Loan Interest (1098E)
- Cancellation of Debt? Foreclosure?
- Child Care Expenses(Must have SSN or EIN)
- Health Saving Account Distribution(1099SA/5498-SA)
- Purchase, sell or otherwise obtain Virtual Currency
- Hold interest in foreign bank account/asset?
- Marketplace health insurance? Need 1095's
- Charitable Contributions (cash/non cash)
- Educator Expenses (up to \$250)
- Receive inherited property?
- Sale of inherited property?

Estimated \$ to IRS/State for 2020? (Need dates/\$)

Owe the IRS for 2019?

If yes, did you pay the IRS in full?

Owe the State for 2019?

If yes, did you pay the State in full?

529 Education Deposits? (Need dates/\$)

Volunteer fire fighter?

Have you received any IRS notices?

Have you received any STATE notices?

Victim of Identity Theft?

If yes, do you have a ID PIN from IRS?

Ponzi scheme Victim?

Federal Disaster Victim in 2020?

Receive COVID Stimulus during Summer 2020?

Receive COVID Stimulus during Jan 2021?

If yes, provide details of Covid Stimulus Payments in NOTES Section

Tax refund to be direct deposited?

Schedule Balance due payments for automatic payment on due date?

Interested in monthly IRS monitoring? Monitoring is available for \$12.95 per month or \$89 for a 12 month period.

NOTES - Please use this section for any notes and/or to provide additional information to help accurately prepare 2020 Tax Return.

Completed By _____

Date _____