BAER TAX GROUP

Corporate(1120,1120S) & Partnership(1065) Annual Information

Is this the first year we are completing your corporate or partnership return? ☐ YES or ☐ NO

If **yes**, we need a complete copy of your previous year federal tax return **including the depreciation schedules**.

Company Information

Business Name: ____________________ Business Phone: ____________________

Current address for the Company: ____________________

Employer Identification Number: ____________________ Date of Incorporation: ____________________

Email Address(es): ____________________

Officer, LLC Member or Partner signing the tax return: Full Name: ____________________

Title: ____________ Phone #: ____________ Social Security #: ____________

Were payments of $600 or more made to individual Contractors or for Rents? ☐ YES or ☐ NO

If YES, were the required Form 1099/1096's issued? ☐ YES or ☐ NO

Did all C-Corp or S-Corp officers receive the required W-2 wages for their compensation? ☐ YES or ☐ NO

If employee W-2 wages were paid, did you or your payroll processor file required Federal employment forms? ☐ YES or ☐ NO

Profit and Loss/Financials will be provided: ☐ QB/Software Reports ☐ QB Online access ☐ Business Worksheet

Company contributions to SEP / 401 Plans / Retirement Plans:

Employee / Officer Name(s): ____________________ Amount(s): ____________

Employee / Officer Name(s): ____________________ Amount(s): ____________

List any changes to existing partner or shareholder ownership, percentages, and dates:

____

List any officer or partner distributions/dividends paid this tax year: Names and amounts:

____

List any cash or property contributions to the business this tax year by officers: Names and amounts:

____

Would you like to review your return in the client portal prior to being E-Filed? ☐ YES or ☐ NO

How would you like to receive your business tax return copy? (check at least one)

☐ PDF in PORTAL (Portal access required- no fee) ☐ Paper by MAIL ($15) ☐ Paper Pick up in OFFICE ($10)

Printed Name: ____________________

Signature: ____________________ Date: ____________

Policies

Our process

Baer Tax Group (BTG) are professionals, we keep all information confidential, and you are held in the highest regard. BTG requests the same in return. BTG only accepts a limited number of clients, and our goal is for the relationship to be mutually beneficial and pleasant.

It generally takes 2-3 weeks from the time all your information is received in full to complete your return. Returns are not processed while you wait. It is very important you have everything submitted for your tax preparation. Refer to our checklists/worksheets to ensure your information submitted is complete.

Zoom, phone and in-person appointments are scheduled from our website. Information can be dropped off anytime. We have a secure outside drop box for after hours. Tax returns can be processed without an appointment.

Complete information is needed before **February 20th** to file by the March 15th deadline. Returns that get placed on extension require complete information before **August 10th** to file by the September 15th deadline, **there is only ONE extension.**

Fees

Payment is due when your taxes are completed. You will receive an invoice upon completion and 3 days later it will be debited as per the payment form. BTG reserves the right not to process your return electronically until payment has been cleared.

The tax return fee covers the preparation of your tax return, it does not cover additional consulting/planning after the preparation, assistance with notices or contacting our office for a refund status. Instructions on how to check on refunds are on your instruction sheet and our website. Refund processing can take time so please check with the IRS or State agency on your refund as per the instructions. BTG charges a $25 fee to check your refund status.

Additional tax planning or consulting appointments or assistance with notices are welcome. Appointments can be scheduled from our website or by calling the office. The website has information about related fees.

Keep copies of your complete tax return or download them to your computer from the portal. Additional copies requested will incur a fee of $25 per year/per copy. Current clients are able to access tax return copies anytime in the secure portal. **Tax returns will not be emailed in order to ensure your sensitive information is kept confidential.**

Client Information

BTG does not audit the information you provide. BTG will not prepare a return that has inaccurate income or expenses or is considered misstated in any way. There are strict guidelines for tax professionals and we must adhere to those guidelines and not jeopardize our professional standing under any circumstance.

Printed Name: ____

Signed:____Date: ________________

Payment Authorization Form

I/We hereby authorize Baer Tax Group to initiate debit entries to our account at the financial institution named below for the purpose of paying our fees for accounting and/or tax work.

Debits are processed upon completion of the work; an invoice will be sent. The debit will take place 3 days from invoice being sent, if the debit day falls on a holiday, the debit is processed the next business day.

I/We understand that if the funds are not available at the time of the transfer, we will receive notification from Baer Tax Group, Inc. that the transfer could not be completed. I/We will then bring current the total amount due by making a credit card payment over the phone with 3.5% fee.

Further, I/we agree not to hold Baer Tax Group, Inc. responsible for any delay or loss of funds due to incorrect or incomplete information supplied by me or by my financial institution.

This agreement will remain in effect until Baer Tax Group, Inc receives written notification of cancellation from me/us at the following email address **office@baertaxgroup.com**. The notice of cancellation must be received in such time and in such manner as to allow enough time for processing.

Person/Business Name on Bank Account: ____

Name of Bank: ____

Account Type: ☐ Checking ☐ Savings

Routing Number (9 digits):__________________________Account Number: __________________

Billing Zip Code on Account:_______________________Phone Number: ____________________

OR

Credit Card info: (will incur a 3.5% fee) – we accept **Visa and Mastercard only**.

Person/Business Name on Credit Card: ____

Credit Card #: ____

Expiration Date:____________________Code from back of card (3 digits): __________________

Billing Zip Code on Account:_______________________Phone Number: ____________________

Printed Name: ____

Signed: _______________________________________ Date: ____________________

Please review bank account / credit card information for accuracy. Bank fees incurred for returned payments due to incorrect information provided to Baer Tax Group will be charged back to customer.

Tax Return Engagement

Baer Tax Group will prepare your federal and state income tax returns based on information you furnish to us. This engagement pertains to the **current tax year**, and our responsibilities do not include preparation of any other tax returns due to any taxing authority.

It is your responsibility to provide all the information required for the preparation of complete, accurateand timely returns. We will furnish you with or you may access information, check lists and/or worksheets from our website as needed to guide you in gathering the necessary information. Your use of such forms will assist us in keeping our fee to a minimum and efficiently processing your data. To the extent we render any accounting and/or bookkeeping assistance, it will be limited to those tasks we deem necessary for preparation of the returns.

You represent that there is adequate substantiation to support deductions for any expenses claimed on the return. We will not audit or otherwise verify the data you submit to us, although we may request additional clarification on information. You are ultimately responsible for the accuracy of your return and should review it carefully before approving/signing it**.** You should retain all the documents, canceled checks, and other data which form the basis of your reported income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority request.

If there is an error on the return resulting from incorrect information supplied by you, or due to your subsequent receipt of amended or corrected tax form(s) (W-2's, 1099's, K-1's), you are responsible for the payment of any additional taxes which would have been properly due on the original return(s), along with any interest and penalties charged by the taxing authority.

Your returns may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination, we will be available upon request to represent you and will render additional invoices for services based on our time and expenses incurred.

Our fee for these services will be based upon the amount of time required at standard billing rates plus out-of-pocket expenses. All invoices are due and payable upon presentation. **Tax returns are electronically filed or presented only after payment is received.**

If the foregoing fairly sets forth your understanding, please sign below. However, if there are other tax return years you wish us to prepare, please inform us by noting so via email at **office@baertaxgroup.com** and we will furnish you with an additional engagement letter.

Very truly yours,

Baer Tax Group

Accepted By

(Print name): ____

Signed:____ Date: ____________