Baer Tax Group

Annual Information - Not-For-Profit Organizations(990)

Organization Name: ______________________________

Address: ______________________________

City: ______________________ State: ____________ Zip Code: ____________

Tax Identification #: ______________________

Person in charge of organization books: ______________________ Phone: ____________

Street, City and State where books are located: ______________________________

____

Name of Officer signing return: ______________________ Soc Sec #: ____________

Address of Officer: ______________________________

City: ______________________ State: ____________ Zip Code: ____________

List for Officers, Directors, Trustees and Key Employees (use additional sheets if necessary):

Name: ______________________ Title: ____________

Avg. weekly hours: ____________ Compensation on W-2 or 1099: ____________

Health Benefits or deferred compensation: ____________ Other compensation: ____________

Name: ______________________ Title: ____________

Avg. weekly hours: ____________ Compensation on W-2 or 1099: ____________

Health Benefits or deferred compensation: ____________ Other compensation: ____________

Name: ______________________ Title: ____________

Avg. weekly hours: ____________ Compensation on W-2 or 1099: ____________

Health Benefits or deferred compensation: ____________ Other compensation: ____________

Number of Volunteers: ____________ Number of voting Members: ____________

Of the voting members, # that are independent: ____________

# of employees for the year (issued a W-2): ________ # of independent contractors (form 1099) for the year: ________

Contractors/Outside Services/Rents paid over $600 annually require a 1099. For example, bookkeepers/accountants, janitorial, carpenters, plowing that are not taxed as corporations.

Were all 1099's issued that were required: ☐ YES or ☐ NO

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

☐ PDF in PORTAL (Email for officer required- no fee) ☐ Paper by MAIL($15) ☐ Paper Pick up in OFFICE($10)

Printed Name: ______________________________

Signed: ______________________ Date: ____________

Please upload to the portal or submit the following if BTG, Inc. does not have access to your accounting system:

Profit and Loss with previous year comparison in EXCEL format (check box if submitted): ☐

Balance Sheet with previous year comparison in EXCEL format (check box if submitted): ☐

List gross receipts of $15,000 or more from fundraising:

Fundraising effort: ____________________________________ Amount: ___________________________________

Fundraising effort: ____________________________________ Amount: ___________________________________

Fundraising effort: ____________________________________ Amount: ___________________________________

Fundraising effort: ____________________________________ Amount: ___________________________________

Event with gross receipts of $5,000 or more:

Event name: ____ Amount: _____________________________________

Event name: ____ Amount: _____________________________________

Event name: ____ Amount: _____________________________________

Event name: ____ Amount: _____________________________________

Name and Address of donors giving $5,000 or greater for the year (attach sheets if necessary):

Name: ____ Amount: _____________________

Complete Address: ____

Name: ____ Amount: _____________________

Complete Address: ____

Name: ____ Amount: _____________________

Complete Address: ____

Name: ____ Amount: _____________________

Complete Address: ____

Name: ____ Amount: _____________________

Complete Address: ____

Name: ____ Amount: _____________________

Complete Address: ____

Name: ____ Amount: _____________________

Complete Address: ____

Name: ____ Amount: _____________________

Complete Address: ____

Policies

Our process

Baer Tax Group, Inc. (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 be sure you have everything submitted for your tax preparation, refer to our checklists to be sure 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 by **April 20** to file by the May 15 deadline. Returns that get placed on extension require complete information by **October 10** to file by the November 15 deadline, **there is only ONE extension. * These dates apply to calendar year filers only.**

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 to not 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 are given 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 $25 fee to check your refund status.

Additional tax planning or consulting appointments or assistance with notices are welcome and can be set up from our website or by calling the office. The website has information about consulting 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. Baer Tax Group, Inc will not prepare a return that has inaccurate income or expenses or is considered misstated in any way. There are strict guidelines for preparers and licensed CPA's and we must adhere to those guidelines and not jeopardize professional licensure under any circumstance.

Printed Name: ____

Signed: ____________________________________ Date: ________________

Payment Authorization Form

I/We hereby authorize Baer Tax Group, Inc 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% 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 OR credit card: ______________________________

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% fee) Visa and Mastercard only.

Credit card #: ____

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

Billing Zip Code on account:______________________Phone number: ____________________

Printed Name: ____

Signed: _____________________________________ Date: ___________________

Tax Return Engagement

Baer Tax Group, Inc. 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, checklists 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 wedeem 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, Inc.

Accepted By (print name): ____

Signed:____ Date: _____________