



A Tax Resolution & Wealth Management Firm

Janelle Ogg, EA
Richard Ogg, EA, CFS®
National Social Security Advisor Certificate Holder
The Master's Tax & Financial Services
716 College Ave, Suite A2, Santa Rosa CA 95404
707-544-5732 FAX 866-649-8853
Tax@TMTFS.com www.TMTFS.com

Individual Engagement Letter Business Addendum

The following items are additional to the Engagement Letter when you operate a business as a sole proprietor when any work is performed by someone other than yourself.

This engagement is for the preparation of the individual income tax returns only (i.e., Form 1040 and related state forms). It does not include the generation of informational forms (e.g., 1099-NEC, 1099-MISC, W-2, W-3) that may be required. If you have any questions regarding the classification of employees versus independent contractors, we strongly encourage you to consult with legal counsel experienced in employment practice matters. We will not be responsible for advising you with respect to independent contractor status as part of our services (because we are not attorneys). Please note that due to the 2018 Dynamex decision by the California Supreme Court and California AB 5 (2019), the law concerning the proper classification of employees or independent contractors in California has changed and is changing through subsequent legislation.

By signing this letter and the materials associated with your tax return(s) prepared by us, you declare that you have provided to us all income and deductible expense information, that all expenses or other deductions are accurate (e.g., are business only and do not include personal expenses), and that you have all required supporting written records. You also declare that you have separately filed all required informational forms (e.g., 1099-NEC, 1099-MISC, 1096, W-2, W-3) unless you also engage us to file those for you.

Your tax return states if you had an obligation to file these forms and also if you did or will file them. Please indicate (Yes/No) if you have filed or will file all required informational forms. _____

Signature only required by those operating business(es).

Taxpayer Name

Signature

Date

Taxpayer Name (*joint return*)

Signature

Date

Revised: 13 January 2023
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