PRO Financial SERVICES GROUP, INC.

Child/Dependent Tax Preparation Checklist

Before we can begin to prepare your income tax return, please go through the following checklist. Mark off the areas that apply to you, and make sure you provide us that information.

PERSONAL INFORMATION: *(**New clients**, please provide two years of tax returns)*

Taxpayer info:

Name:__________________________________ Email:__________________________________

Occupation:__________________ SS#:____________ Birthday:__________ Phone:______________

Address:______________________________ City, State, Zip:________________________________

- ☐ **Please provide a copy of a valid driver's license or state ID card for the Taxpayer**
- ☐ **Voided check or bank account and routing number**
    - *Returning Clients*: If your bank account is the same as last year, please provide the last 4 digits of the account number and bank name:____
- ☐ Check box if you would like your tax refund **direct deposited** in to your bank account
- ☐ Check box if you would like your tax liability (amount you owe) **auto withdrawn** from your bank account

Employed
- ☐ W-2 forms (Income earned out of state will increase fee)
- ☐ Self-employed income 1099-misc (Will increase fee)

Unemployed
- ☐ Unemployment, state tax refund (1099-G)

Savings & Investments or Dividends
- ☐ Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
- ☐ Year end brokerage statements (1099-B)

Educational Expenses
- ☐ Forms 1098-T from educational institutions
    - I have documentation to support all educational expenses.
- ☐ Summary of educational expenses (Books, lab fees, computer expense, etc…)
- ☐ Records of any scholarships or fellowships you received
- ☐ Form 1098-E if you paid student loan interest
- ☐ Form 1099-Q for qualified education programs/ Funds used from 529 accounts

Health Insurance
- ☐ **Were you covered all 12 months of 2018 with health insurance?**
    - ○ **Yes**
    - ○ **No**

Comments:

Engagement Agreement

Thank you for selecting Pro Financial Services Group, Inc to assist you with your 2018 tax matters.

This engagement agreement provides the terms and conditions, as well as the nature and extent of the income tax services we will provide and confirms your agreement to all terms as outlined.

Pro Financial will prepare your 2018 federal and state income tax returns from information that you have provided. We will not audit or verify the data you submit to us, although we may ask for clarification of some items. You will assume responsibility for the accuracy of all data and the maintenance of said records. It is also your responsibility to provide all necessary information, in a timely manner so we can complete your income tax returns as soon as possible.

The fees for the services to be rendered will be based upon our standard form rates. We will bill at our current hourly rate for additional services as required, which may include extra conferences, bookkeeping, responding to legal matters and any other necessary work. We do reserve the right, in some matters to request a retainer fee to be paid in advance.

Our invoices are due and payable upon completion of your income tax returns. If you cancel or discontinue our services and we have already performed work on your tax return, you agree to pay us for such work performed based upon our current hourly rates. As additional consideration for us to provide you tax services, you agree that the extent of our liability for damages to you for any actions will not exceed the total amount paid by you for our services.

If your returns are audited by any taxing authorities, we will be available to represent you at an additional fee. If any interest or penalties are assessed, they will be your responsibility. Any additional services, including, complying with subpoena requests, will be billed at our current hourly rate of $125 per half hour. The hourly rate for any services required between February1st through April 15th is $225 per half hour.

The taxpayer’s signature below indicates that the engagement terms as described above are understood and acceptable.

We wish to express our appreciation for this opportunity to work with you.

By signing below, I authorize Pro Financial Services Group, Inc. to complete my tax returns.

Please note: Payment is due upon completion of service

Taxpayer/Parent Signature: ____ Date:_____________________