

## It's Tax time Again!



- **Review this packet carefully and keep it for your records.**

RETURN 2<sup>nd</sup> Packet: CHECKLIST AND DOCUMENTS

- **Our Fee Schedule has changed.**

Please review carefully the new 2023/24 Fee Schedule

- **\$25 Early Bird discount for “Drop-offs” before March 1.**

Must have all required documentation

- **\$50 Gift Card for new clients – Referral Card enclosed.**

Amazon - Visa Gift Card

- **We are continuing to use our drop off / pick up curbside protocol this year - If you *require or desire* a “face to face” scheduled appointment with one of the prepares, you can request one for an additional fee. \***

Please see the fee schedule and indicate on your intake form

- **Payment accepted: Cash, Check, Venmo (@LegacyTax), or Credit Card (5% fee for using credit card).**

## PRIVACY NOTICE

Federal law mandates that, as our client, we must make you aware of a law protecting the privacy of individuals. Our firm respects and maintains the confidentiality of our client. In compliance with the law, we inform you that we collect nonpublic and personal information about you from the following source:

-Information we receive from you on tax preparation worksheets and other documents we use in preparing your tax return or other forms and information about your transactions with us or others.

We do not disclose any nonpublic personal information about our clients or former clients to anyone, except when instructed to do so by clients, or as necessary for electronically filing your tax return, or as permitted by law.

Access to nonpublic personal information is restricted to those professionals necessary for providing accounting and tax services to our clients. We maintain physical, electronic, and procedural safeguards that comply with federal standards to guard your nonpublic personal information.

Your confidence in us is very important and we want you to know that your personal and tax information is safe. If you have any questions or concerns, please contact us: [taxsupport@legacytaxadvisory.com](mailto:taxsupport@legacytaxadvisory.com)

## ENGAGEMENT TERMS

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. To ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements:

We will prepare your federal and state income tax returns from information that you will provide us. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, canceled checks, and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax return; therefore, you should review them carefully before you sign them.

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations or other irregularities, should any exist. We will render such accounting and bookkeeping assistance as determined to be necessary for the preparation of the income tax returns. We will use professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.

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 a government tax examination, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred.

## Fee Schedule on Other Side

**1623 York Road Lutherville MD 21093 (410) 828-8870**