



Date _____

New Client _____ Returning Client _____

Phone number _____

Name: _____ Spouse Name: _____

SSN: _____ SSN: _____

DOB: _____ DOB: _____

Current Address _____

****Filing status** Single/Head of Household/Married/Married filing Separate**

Market place insurance No _____ Yes _____ IF YES Provide form 1095A

****Stimulus payments Please put the correct amount for each stimulus payment received****

EIP1(2020 Return) _____ EIP2(2020 Return) _____ EIP3(2021 Return) _____

****Child tax credit, please put the correct amount of CTC advance payment you received****

CTC Advance payment _____

****Please provide the IRS letter received in January 2022 or provide a 2021 tax transcript from IRS. If you are filing married filing jointly, we will need a transcript from both taxpayer and spouse. Incorrect amounts WILL DELAY the REFUND****

Dependent Information:

Name: _____

Name: _____

DOB: _____ SSN: _____

DOB: _____ SSN: _____

Relationship: _____

Relationship: _____

****NEW MANDATORY REQUIREMENT** We will need the social security card, birth certificate, medical records/school records/and or court records to provide proof of residency for each dependent on the tax return. Tax return will not be processed without these documents.****

****RETURN PRICES INCREASE \$500 if we do not have this information, to cover our penalties****

Refund Preference: Mail Check _____

Direct deposit: Routing number _____ Account Number _____

Under penalties of perjury, I declare that I have disclosed the correct and needed information for preparation of my tax return (original or amended) I am now authorizing, and to the best of my knowledge and belief, it is true, correct, and complete.

Taxpayer _____

Spouse _____

****Any difference in the amounts provided for stimulus or child tax credit advance will result in a longer delay of refund. Make sure to read and sign the attached engagement letter.****

Due to IRS STAFFING SHORTAGES, THERE WILL BE REFUND DELAYS!!

**DOREEN CREEL-WOOD
ACCOUNTING & PAYROLL SERVICES**

**304 W Broadway Ave
HOPEWELL, VIRGINIA 23860**

**804-452-4442 (office)
Email: dcw@doreencreel.com**

**1-888-486-7360(fax)
website: www.doreencreel.com**

Thank you for choosing Doreen Creel-Wood Accounting to assist you with your tax returns. This letter confirms the terms of my engagement with you and outlines the nature and extent of the services I will provide.

I will prepare your federal and state income tax returns. I will depend on you to provide the information to prepare complete and accurate returns. I may ask you to clarify some things but will not audit or otherwise verify the data you submit.

Information you provide will be kept confidential. I restrict access to your information and maintain physical, electronic and procedural safeguards to protect your information.

I will perform accounting services only as needed to prepare your tax returns. My work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. I will, of course, inform you of any material errors, fraud, or other illegal acts I discover. The law imposes penalties when taxpayers underestimate their tax liability. Please contact me if you have concerns about such penalties.

Should I encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, I will outline the reasonable courses of action and the risks and consequences of each. I will ultimately adopt, on your behalf, the alternative you select.

My fee will be based on the complexity of the return and will normally be quoted in advance of my work.

I will return your original records to you at the end of this engagement. You should securely store these records, along with supporting documents, cancelled checks, etc., as these items may later be needed to prove accuracy and completeness of a return. I will electronically retain copies of your records and our work papers for your engagement for seven years, after which these documents will be destroyed.

If your tax return is selected for audit by the IRS or by the state tax authorities, I am available to represent you or to prepare materials in response to correspondence. However, these are additional expenses not included in my tax preparation fees and I will render additional invoices for the time and expense incurred. Please let me know right away if you receive any letters for the IRS or any other tax agency. I will correct your return for free and pay any penalties if I am at fault. However, I am not responsible for payment of any taxes owed.

My engagement to prepare your tax return will conclude with the delivery of the completed returns to you (if paper-filing) for your signature and our subsequent submittal of your tax return (if e-filing). If I am not able to e-file your returns, you will be solely responsible for filing the returns with the appropriate tax authorities. Review all tax return documents carefully before signing them.

This letter can apply to future years of tax preparation services unless the agreement is terminated or amended in writing.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign the enclosed copy of this letter in the space indicated and return to me.

As always, I appreciate your confidence in me.
Sincerely,

Doreen Creel-Wood

Date: _____

I, the client, agree to the terms and conditions of this engagement letter, with my hand and signature below:

Date: _____

Printed Name: _____