Belt Accounting and Tax

Dear Client:

We are looking forward to working with you again this year! The enclosed Client Information Sheets are designed to help you gather the tax information needed to prepare your 2019 personal income tax return. **These questions provide us with important tax items necessary for us to prepare your return quickly, efficiently, and most important, accurately. Therefore, it is imperative that all sections are completed.**

On the back side of this letter, please find our 2019 Individual Tax Return Engagement Letter. This **must** be signed and returned with your tax information in order for us to begin work on your tax return.

You will also find a helpful checklist on page 8 of the Client Information Sheet that will assist you in gathering all the necessary tax documents to complete your tax return.

You have the following options for getting all documents (MUST be in PDF format) to us:

1. Belt Accounting portal – upload PDF documents directly to our secure portal (call if you would like to be set up or refreshed on this process).
2. Send PDF documents via secured email link that can be sent to you (email admin@belt-accounting.com to request this option).
3. Drop off at our office during normal business hours: ****Note our new office location****
   2417 Silvernail Rd
   Pewaukee, WI 53072

Mon-Thu	9:00 am – 6:00 pm
Fri	9:00 am – 4:00 pm
Sat	9:00 am – 1:00 pm
4. Drop off *with* a scheduled appointment to meet with a staff member. Appointments can be scheduled online at www.belt-accounting.com or call our office at (262) 646-4323 and press 0 to reach our admin.
5. Mail to our new address below. If selecting this option, it is necessary that you mail with tracking (fedex, UPS, etc.) to ensure documents are not lost or compromised.

To assist us in meeting the filing deadline for your 2019 income tax return, **your tax data should be received by us no later than Saturday, March 30th.**

If we receive your data after 3/30/2020, we will make every effort to meet the filing deadline, but we will **require a minimum $50 fee up front** to file an extension on your behalf. In addition, you are responsible for ensuring that any balances due to the federal and/or state(s) are made on or before April 15, 2020. The extension ONLY provides additional time to file the return, not to pay your taxes. If you believe that you will have a balance due to the IRS and/or state(s), and require assistance with calculations, hourly rates will apply.

You will receive notification via e-mail when your tax return is complete. Please ensure that you are checking your email regularly, including your spam folders. Your completed 2019 income tax returns will be submitted for electronic filing to the federal and state(s) governments upon receipt of payment of your 2019 tax preparation fee and signed Form 8879.

Thank you for the opportunity to serve you.

Sincerely,
Belt Accounting & Tax, LLC

We have moved!!
New address: 2417 Silvernail Rd, Pewaukee, WI 53072

2019 INDIVIDUAL TAX RETURN ENGAGEMENT LETTER

Dear Client:

This letter confirms the terms of our engagement with you and the nature and extent of the services we will provide.

We will prepare your 2019 federal and all state income tax returns using the information you provide to us. We may ask for clarification of some items, but we will not audit or otherwise verify the data you submit. The completed Client Information Sheet is designed to assist you with gathering all the information required to complete your return, along with providing us necessary data to ensure accuracy. Therefore, it is essential that this Client Information Sheet be completed in its entirety and signed prior to preparation of your tax return.

It is your responsibility to provide information required for preparation of complete and accurate returns. You should keep all documents, canceled checks and other data that support your reported income and deductions. They may be necessary to prove accuracy and completeness of the returns to a taxing authority. You are responsible for the returns, so you should review them carefully before you sign them.

Our fees for this work will be based on the complexity of your tax return, the amount of time required to complete the return, including time spent following up on incomplete or missing information and documents, plus any out-of-pocket expenses. If you require an estimate, we will give you a non-binding estimate based upon your representations about the complexity of your returns. All tax return invoices are due and payable upon presentation to you and prior to us submitting them on your behalf.

Our fees include the following:

- 1040 Federal and State returns with schedules.
- Estimated tax payments calculation.
- Client meeting – one 15 min. client meeting is included in the fee. Fees will be adjusted for additional meetings.
- Client phone calls and emails to answer basic tax questions. Additional fees may apply for calls and emails that require research or are related to tax planning.
- Tax questions and tax information – no charge for general tax information. Exception will be for advanced research.
- ONE copy (electronic or paper) of your tax return. If additional copies are requested they will be provided for an additional fee.

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. If the government selects your returns for review, we can arrange to represent you. Such representation will be a separate engagement for which an engagement letter will be provided to you. Fees and expenses for defending the returns will be invoiced in accordance with terms we agree on for that engagement.

In the unlikely event of a calculation error in the preparation of your tax return, we will reimburse you for any penalty for which we made you liable, provided the information that you supplied us was correct.

We are committed to the safeguarding of your confidential information and we maintain physical and electronic safeguards to protect your information within our office. Unless required by law, we will not disclose any information about you unless we have your written approval as required under Reg. §301.7216-3(a)(1), even if you are no longer a client.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign this letter in the space indicated below and we will retain a copy in your client file.

Again, we want to express our appreciation for the opportunity to work with you, and hope that you will bring any questions or concerns to our attention.

Sincerely,
Belt Accounting & Tax, LLC

Taxpayer Signature	Print Name	Date
Spouse Signature	Print Name	Date