



Tax Return Service Agreement

1307 NE 78th Street B12, Vancouver WA 98665

Tax Return Year _____

Taxpayer Name: _____ Driver Lic. #: _____ State: _____ Issue Date: _____ Expiration Date: _____	Spouse Name: _____ Driver Lic. #: _____ State: _____ Issue Date: _____ Expiration Date: _____
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Contact Phone(s) _____ Email _____

If you are not the Taxpayer(s) listed above: Your Name: _____ Relationship: _____

- ✓ NW Accounting Inc. will prepare the tax returns requested. We will depend on you to provide the information we need to prepare a complete and accurate return. We may ask you to clarify some items, but will not audit or otherwise verify the data you submit. Using the reminder list, an organizer and participating in an interview are ways we try to get the information, but the client is ultimately responsible for providing accurate information.
- ✓ We will perform accounting services only as asked or needed for your tax return. Extra charges may apply for this service. Our work will not include procedures to find defalcations or other irregularities. We will of course inform you of any material errors, fraud or other illegal acts we discover.
- ✓ The law imposes penalties when a taxpayer underestimates and underpays their tax liability. It is the client's responsibility to pay all taxes, penalties and interest due. If the penalties or interest is tied to an item NW Accounting had knowledge of and incorrectly prepared on the tax return, we will reimburse you for the penalties and interest. The Tax is always the sole responsibility of the taxpayer.
- ✓ Should we encounter instances of unclear tax law, or of potential conflicts in interpreting the law, or you have a conflicted position with another tax payer we service; we will outline a reasonable course, the risks and consequences. You will ultimately be asked to sign that you understand and accept the course of action at your own risk.
- ✓ Our fee is based on the time and forms we prepare at standard billing rates. Services are payable upon pick up of the tax return, unless other arrangements are made.
- ✓ We will return original records to you at the end of this engagement. You should securely store these records, along with all supporting documents, canceled checks, etc. It is the client's responsibility to provide these documents should there be an audit. Whenever possible we store documents electronically for 7 years after which time, they will be destroyed.
- ✓ It is the client's responsibility to return to our office to sign their return by the due date of the return. Our engagement concludes at the time of delivery of your completed returns to you (if paper filing) or your signature and our subsequent submittal of your tax return if e-filing. If you did not select to e-file, or your return is not eligible to be e-filed, it is your sole responsibility to follow our instructions, sign the returns, and to deliver the returns to the appropriate taxing authorities.

- ✓ **FOREIGN ASSET TAX Returns** are required if you have assets in a foreign bank account of greater than \$10,000 on any day during the year. If you have other foreign assets or are purchasing **VIRTUAL CURRENCY**, it is the client's responsibility to inform NW Accounting, Inc. so the proper tax returns can be filed. We are not responsible for penalties related to foreign assets.
- ✓ NW Accounting **Privacy Policies** are listed on the back of this form. Please review these policies.

I understand these policies and request NW Accounting, Inc. to prepare my tax returns listed above. If applicable, both spouses must sign this engagement.

Taxpayer Signature _____ Spouse Signature: _____

NW Accounting Staff: _____ Todays Date: _____



Our Privacy Statement

- **Your privacy is important to NW Accounting, Inc.** (dba: Northwest Accounting & Tax Service). We keep data secure and behind locked doors. We review and insure computers are protected and that protection is reviewed on a regular basis.
- **For your protection, and ours, please do not send sensitive information via email or as an attachment to emails.** We have a secure portal available at <https://nwatax.securefilepro.com/> and a guest transfer is available for your convenience.
- **We acknowledge that we collect non-public data on our** clients from various sources: Interviews, Organizers, documents the client provides, tax returns, payroll data and several other possible sources.
- **We do not disclose any non-public information about our clients or former** clients to anyone, except when requested by the client, or as required by law.
- **We will not send information on your behalf without a written request by** you and a verbal conversation where you can verify the request. You must provide in writing who, what and where. Any electronic data we transfer will be password protected before we transfer it. You must provide the password to the receiving party.
- **We restrict access to personal information concerning you**, except to our employees who need such information in order to provide services to you. Employees all sign a “Do not disclose” statement and this policy is reviewed from time to time.
- **We do have some vendors** (janitors, IT support and software providers) that from time to time may see your data in passing. Vendors have an agreement with our company to not spend time looking at data and are restricted from using any data they may see. Materials being disposed of are shredded on site by a professional shredding company with a certificate of destruction.
- **If you have any questions about our privacy policy, please contact us.**