



# Tax Return Service Agreement

Today's Date: \_\_\_\_\_ Tax Return Year \_\_\_\_\_

Please print

**Taxpayer Name:** \_\_\_\_\_ **Spouse Name:** \_\_\_\_\_

#1 Phone Number: \_\_\_\_\_ Cell or Home #2 Phone Number: \_\_\_\_\_ C or H

#1 Email Address: \_\_\_\_\_ #2 Email Address \_\_\_\_\_

**If you ARE NOT the Person above:** Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

## Please Bring Taxpayers Drivers License to our office or upload it to the Portal

- ✓ 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 sign their return by the due date of the return. You can sign in person at our office or electronically thru a secure portal. 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 and INCOME TAX Returns** are required if you have assets in a foreign bank account of greater than \$10,000 on any given day during the year. If you have other foreign assets or a foreign bank account, 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 or 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:	ID Checked <input type="checkbox"/> TP <input type="checkbox"/> Spouse	Today's 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 security, and ours, please DO NOT send sensitive information via email or as an attachment to emails.** We have a new secure portal system available for our clients at [https://login.atomanager.com/ATOM\\_NWATAX/WebInfo.aspx](https://login.atomanager.com/ATOM_NWATAX/WebInfo.aspx)
- **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 of your information is to be sent. 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 avoid spending time looking at data and are restricted from using any data they may see. Materials to be 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.**