

2009

**CAMP PILGRIM & ASSOCIATES**

*Certified Public Accountants*

www.camppilgrim.com

\*E-mail \_\_\_\_\_ Home Phone \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

**Name:** Last \_\_\_\_\_ First \_\_\_\_\_ MI \_\_\_\_\_ SS# \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_ Occupation \_\_\_\_\_

Cell phone \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

**Spouse:** Last \_\_\_\_\_ First \_\_\_\_\_ MI \_\_\_\_\_ SS# \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Date of Birth \_\_\_\_/\_\_\_\_/\_\_\_\_ Occupation \_\_\_\_\_

Cell phone \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

**Home address:** \_\_\_\_\_  
\_\_\_\_\_

>>>>>>> Taxpayer or spouse was a member of the U.S. Armed Forces during 2009? \_\_\_\_\_

I certify that I can legally claim the following dependants.	Circle one	How many months lived with taxpayer in 2009?
<b>Dependents:</b> Name _____	DOB ____/____/____ m / f	SS# _____ - _____ - _____
_____	DOB ____/____/____ m / f	SS# _____ - _____ - _____
_____	DOB ____/____/____ m / f	SS# _____ - _____ - _____
_____	DOB ____/____/____ m / f	SS# _____ - _____ - _____

**FILING STATUS - Check one**

SINGLE \_\_\_\_ / MARRIED FILING JOINT \_\_\_\_ / MARRIED FILING SEPARATE \_\_\_\_

Do you want to Direct Deposit any and all refunds to your bank account? Yes \_\_\_\_ No \_\_\_\_

If you want to Direct Deposit any refund you MUST leave us a voided check with your bank information.

initial \_\_\_\_\_ Voided Check Number \_\_\_\_\_

>>>> We will be electronically filing all tax returns. <<<<

**(Read and sign reverse side)**

## 1040 - INDIVIDUAL TAX RETURN ENGAGEMENT LETTER

Dear Client:

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. In order 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 2009 federal and requested state income tax returns from information that you will furnish 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. We will furnish you with questionnaires and/or worksheets to guide you in gathering the necessary information. Your use of such forms will assist in keeping pertinent information from being overlooked.

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 returns and, 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 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.

The law provides various penalties that may be imposed when taxpayers understate their tax liability. If you would like information on the amount or the circumstances of these penalties, please contact us.

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

Our fee for these services will be based upon the amount of time required at standard billing rates plus out-of-pocket expenses. All invoices are due and payable upon presentation.

If our services are required for testimony or attestation consulting for civil or criminal court proceedings, our hourly billing rate will be the current billing rate in effect at the time of the request plus reimbursement for all out of pocket expenses.

If the foregoing fairly sets forth your understanding, please sign this letter in the space indicated. However, if there are other tax returns you expect us to prepare, such as gift and/or property, please inform us by noting so just below your signature at the end of the returned copy of this letter.

We want to express our appreciation for this opportunity to work with you.

Very truly yours,

*Camp, Pilgrim & Associates, CPAs*

I certify that I have read and understand this engagement letter.

Accepted by:

\_\_\_\_\_ Date \_\_\_\_\_