

8397 Duncan Street, Douglasville, Georgia 30134  
770-949-0723

Dear Tax Client(s):

January 9, 2025

As a new year begins, we are preparing for the 2024 Income Tax Season. Our tax organizer will be available online at our web site: [www.camppilgrim.com](http://www.camppilgrim.com) by mid January 2025.

**Go to our web site and click on the following tabs:**

**2024 Tax Organizer - click tab, print and complete.**

**2024 Engagement Letter - click tab, print and complete.**

**Please review the section of the organizer pertaining to the Affordable Care Act and provide the necessary information. We must have all of this information in order to reduce your tax liability and prepare an accurate tax return. Failure to provide this information will prolong the preparation of your tax return.**

**Completing these forms will speed up your sign-in and help us prepare your return completely, correctly and quickly.**

As soon as you receive all of your tax documents and are ready to have your return prepared, bring your organizer, engagement letter and backup documents to our office for sign-in. You may drop off your documents at the reception window if you feel that you do not need an appointment. Due to the growth of our business, we will be streamlining certain procedures. We are asking that you provide us with a current email address that is checked frequently. We will use this method of communication to notify you when your return is ready or if additional information is needed. All returns will be completed on a first come first serve basis. **We will be filing extensions for all returns not received prior to March 15, 2025.**

**If you need an extension, you must sign the extension form and receive a confirmation number. If you do not have a confirmation number, you are not guaranteed an extension.**  
**NO EXCEPTIONS!**

We also have an "After Hours Tax Document Drop Box". This is located on the right hand side of the front entrance and marked with the word "TAX". Please note that this drop box is only used from January 2 through April 14. If you would like to use the box at other times during the year, we ask that you call to inform us.

We continue to bill on a per form basis rather than an hourly rate. This is to ensure that each client is given a more reasonable tax return rate and there will be no question over the fees charged. All invoices are due before the completed tax return can leave our office. We will continue to E-file every possible return. This cuts down on possible audits and "errors" on behalf of the Internal Revenue Service and the Georgia Department of Revenue, not to mention the hassle and cost of mailing the returns. **Because we value your opinion of our firm, we have initiated a referral program, so please tell your family and friends about us. (See Insert)**

We're looking forward to seeing you once again and appreciate your business. Please feel free to call us with any questions you may have or visit our web site: [www.camppilgrim.com](http://www.camppilgrim.com)

Sincerely,  
*Dana Pilgrim, CPA*

2024

CAMP PILGRIM CPA

www.camppilgrim.com

"Best" E-mail \_\_\_\_\_ "Best" Phone # \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Please check frequently. We will notify you via email if we need additional information to complete your return and when your return is completed and ready for pickup.

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

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

Cell phone \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Home 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 2024? \_\_\_\_\_

I certify that I can legally claim the following dependants.		Circle one	How many months lived with taxpayer in 2024?
<b>Dependents:</b> Name _____	DOB ____/____/____	m / f	SS# _____ - _____ - _____
_____	DOB ____/____/____	m / f	SS# _____ - _____ - _____
_____	DOB ____/____/____	m / f	SS# _____ - _____ - _____
_____	DOB ____/____/____	m / f	SS# _____ - _____ - _____

Please notify us if any of your dependents filed a tax return and claimed themselves  
Please notify if any dependent exemptions, Child Tax credits, Earned income credits or education credits were disallowed last year

**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 attach 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 2024 Federal and Georgia income tax returns from information that you will furnish us. Please advise us in writing if we are to prepare any additional returns for this year. 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.** Information to assist in the gathering of records can be found on our website.

**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 approve the e-filing of the returns.**

**Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover errors and omissions in your records, should any exist.** You may request that we perform additional services not contemplated by this engagement letter. If this occurs, we will communicate with you regarding the scope and estimated cost of these additional services. Absent from other written communication, our services are limited to and governed by this engagement letter.

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. However, if a position is not upheld and penalties and interest are assessed, you agree to hold our firm harmless from any action arising thereof.

The law provides various penalties that may be imposed when taxpayers understate their tax liability. All tax is due by April 15. An extension is only an extension to file a return not an extension to pay any tax due. Late payment penalties will be assessed. Extensions are filed by request only.

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. You agree to notify us immediately upon receipt of any correspondence from any agency covered by this letter.

**Additional consulting or tax planning work during the rest of the year will be invoiced separately from the tax preparation fee.**

*New privacy laws were established by the IRS effective January 1, 2009 and we are now prohibited from providing confidential information or copies to anyone other than you without your specific, written authorization.*

**Third party verification of income:** From time to time various third parties may request that we sign, for you, some verification of income, employment or tax filing status. Because we were engaged only to prepare your income tax return, without examination, review, audit or verification, our insurance carrier as well as the state board of accountancy prohibit us from signing any such document and we suggest that you have them send IRS Form 4506 to the IRS to obtain such verification.

If our services are required for testimony or attestation consulting for civil or criminal court proceedings, our hourly billing rate will be the current rate in effect at the time of the request plus reimbursement for all out of pocket expenses. You hereby agree to be responsible for these fees should this situation arise.

In recognition of the relative risks and benefits of this agreement to both the client and the accounting firm, the client and accounting firm have agreed on the fair allocation of risk between them. As such, the client agrees, to the fullest extent permitted by law, to limit the liability of the accounting firm to the client for any and all claims, losses, costs and damages of any nature whatsoever, so that the total aggregate liability of the accounting firm to the client shall not exceed the accounting firms total fee for services rendered under this agreement. The client and the accounting firm intend and agree that this limitation apply to any and all liability or cause of action against the accounting firm, however alleged or arising, unless otherwise prohibited by law. Both parties agree that there is a one year

INITIALS \_\_\_\_\_

limitation period to bring a claim against us for errors and omissions. The one year period will begin upon the date of the tax professional's signature on the tax returns covered by this engagement letter.

If the foregoing fairly sets forth your understanding, please initial and sign this letter in the space indicated.

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

Very truly yours,

*Camp. Pilgrim CPA*

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

Accepted by:

\_\_\_\_\_

Date \_\_\_\_\_

### **Tax Return PDF Request**

I would like a PDF of the return to be emailed to me upon payment of my invoice. I understand there is a \$10 charge at the time of return preparation for this service. If I request the PDF after the return has been completed, there will be a charge of \$25

Accepted by:

\_\_\_\_\_

Date \_\_\_\_\_

**\*If you had marketplace insurance, please provide form 1095-A**