

BUSINESS CLIENT INFORMATION SHEET

ROSSMAN TAX SERVICE

TAX YEAR 2020

- PLEASE COMPLETE BOTH PAGES OF THIS FORM
- * INDICATES REQUIRED FIELDS
- **WE CANNOT PREPARE RETURNS WITHOUT A CLIENT INFORMATION SHEET**

*CORPORATION NAME _____

FEDERAL ID NUMBER _____

TYPE OF ENTITY: C CORPORATION S CORPORATION PARTNERSHIP SOLE PROPRIETORSHIP
 FIRST YEAR FINAL YEAR LLC SINGLE MEMBER LLC MULTIPLE MEMBER LLP TRUST ESTATE

*STREET ADDRESS _____

*CITY, STATE & ZIP CODE _____

CORPORATION PHONE NUMBER _____ FAX NUMBER _____

***COMPANY CONTACT PERSON**

PRIMARY -*NAME _____ *CONTACT PHONE # _____

*EMAIL ADDRESS _____ *CONTACT CELL # _____
*CELL PHONE CARRIER _____

SECONDARY -*NAME _____ *CONTACT PHONE # _____

*EMAIL ADDRESS _____ *CONTACT CELL # _____
*CELL PHONE CARRIER _____

OFFICER (MEMBER) INFORMATION (YOU MUST SUPPLY INFORMATION FOR ALL OFFICERS OF THE CORPORATION)

_____ / _____ / _____
FULL NAME ADDRESS SOCIAL SECURITY NUMBER

_____ / _____ / _____
FULL NAME ADDRESS SOCIAL SECURITY NUMBER

_____ / _____ / _____
FULL NAME ADDRESS SOCIAL SECURITY NUMBER

ROSSMAN TAX SERVICE 2020 BUSINESS ENGAGEMENT LETTER

Dear Client,

Due to IRS and our Insurance Company's regulations we are requesting that you read the following, sign and date. If you are filing a Business Tax Return, the Officer/Partner who is signing this Engagement Letter attests that all parties in the business have reviewed this engagement letter and agree to the Terms of the Engagement for Preparation of the 2020 Business Tax Return.

We (I) hereby attest to the following:

- 1) All information provided in this business client information sheet is correct and that we have provided current banking information.
- 2) We understand that if we are having Sales Tax or Payroll done by Rossman Tax Service we are responsible to meet all deadlines and that Rossman Tax Service is not responsible for any penalties incurred due to late filing of these forms. We acknowledge receipt of the annual calendar for all deadlines for Sales Tax & Payroll.
- 3) We (I) have provided a Profit & Loss Statement and a Balance Sheet that are required to prepare the 2020 Business Tax Return.
- 4) We (I) are responsible to have the required information for the Preparation of the Corporation Return to Rossman Tax Service by January 15th otherwise we understand we will be put on extension.
- 5) We (I) are aware that the NYS Corporate Franchise Fee will be automatically withdrawn from our bank account.
- 6) We (I) have adequate documentation to support the income & expenses listed on the Business Tax Return.
- 7) We (I) understand that Rossman Tax Service will not be held responsible for any errors on the business tax return due to client omissions or incorrect information on the business client information sheet and that an additional fee will be incurred in order to make corrections.
- 8) We (I) understand that the Officers/Partners are responsible for any tax liability on the Business Tax Return.
- 9) We (I) are responsible for the Business Tax Return and payment of any balance due to the IRS or New York State by March 15th.
- 10) In the event of a discontinuance of the Corporation/Partnership and Rossman Tax Service is the representative of the Corporation/Partnership. If there is potential information that may be harmful to one of the Officers/Partners, Rossman Tax Service will be obliged to divulge such information to the other Officers/Partners. Rossman Tax Service reserves the right, where there is a conflict of interest between the Officers/Partners and Rossman Tax Service to request that the Business client seeks accounting advice elsewhere.
- 11) We(I) understand that it is our(my) responsibility to have reviewed the Business Tax Return, Transmittals and bank account information prior to signing the e filing forms with the preparer and are aware of the content of the Business Tax Return and whether the Business is receiving a refund or if the Business has a balance due.
- 12) All services must be paid in full before E-Filing or receipt of a Business taxpayer copy.
- 13) NO POST DATED CHECKS WILL BE PERMITTED. There is a \$50 Bounced Check Fee.
- 14) One business taxpayer copy will be given each year upon payment. Any additional copies of Tax Returns will require a \$25 fee.
- 15) All work papers and prepared business tax returns are the property of Rossman Tax Service. If the return is not prepared by us we will return to the business client all of their documents. Not our work papers or tax returns.
- 16) We (I) understand that if requested by IRS or State, we (I) will produce receipts and documentation to substantiate income and deduction. I further understand that I should keep records of income and receipts for a minimum of 7 years.

THIS ENGAGEMENT IS LIMITED TO THE PREPARTION OF BUSINESS TAX RETURNS. ADDITIONAL SERVICES SUCH AS PROJECTIONS OR GOVERNMENT EXAMINATIONS WILL INCUR AN ADDITIONAL CHARGE. WE (I) ALSO ACKNOWLEDGE THAT PAYMENT IS DUE UPON COMPLETION OF THE BUSINESS TAX RETURN AND THAT ONCE PAYMENT IS MADE, THE FEE FOR SERVICESW RENDERED IS NONREFUNDABLE.

*

BUSINESS NAME

DATE

SIGNATURE