

TRUST/ESTATE CLIENT INFORMATION SHEET

ROSSMAN TAX SERVICE

THE TAX YEAR 2023

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

* TRUST NAME _____

FEDERAL ID NUMBER _____

*TYPE OF ENTITY: TRUST ESTATE

*STREET ADDRESS _____

*CITY, STATE & ZIP CODE _____

***TRUSTEE/FIDUCIARY/EXECUTOR CONTACT** (PLEASE USE ADDITIONAL INFORMATION SECTION ON PAGE TWO FOR ADDITIONAL CONTACT INFO)

*PRIMARY NAME _____ *CONTACT PHONE # _____

*EMAIL ADDRESS _____ *CONTACT CELL # _____

SECONDARY -NAME _____ CONTACT PHONE # _____

EMAIL ADDRESS _____ CONTACT CELL # _____

BENEFICIARIES INFORMATION (YOU MUST SUPPLY INFORMATION FOR ALL BENEFICIARIES OF THIS TRUST/ESTATE)

_____/_____/_____

FULL NAME ADDRESS SOCIAL SECURITY NUMBER

_____/_____/_____

FULL NAME ADDRESS SOCIAL SECURITY NUMBER

_____/_____/_____

FULL NAME ADDRESS SOCIAL SECURITY NUMBER

ROSSMAN TAX SERVICE 2023 TRUST/ESTATE ENGAGEMENT LETTER

Dear Client,

Due to IRS and our insurance company regulations, we request that you read the following, sign, and date. If you are filing a Trust/Estate Tax Return, the Trustee/Fiduciary/Executor who is signing this Engagement Letter attests that all parties in the Trust/Estate have reviewed this engagement letter and agree to the Terms of the Engagement for the preparation of the 2023 Business Tax Return.

We (I) hereby attest to the following:

- 1) All information provided in this Trust/Estate Client Information Sheet is correct.
- 2) We (I) are responsible to have the required information for the Preparation of the Trust/Estate Return to Rossman Tax Service by March 25th, 2024.
- 3) We (I) understand that Rossman Tax Service will not be held responsible for any errors on the Trust/Estate Tax Return due to client omissions or incorrect information on the client information sheet and that an additional fee will be incurred to make corrections.
- 4) We (I) understand that the Trustee/Fiduciary/Executor is responsible for any tax liability on the Trust/Estate Tax Return.
- 5) We (I) are responsible for the Trust/Estate Tax Return and payment of any balance due to the IRS or Local State Taxing Authority by April 15th.
- 6) In the event of a discontinuance of the Trust/Estate 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.
- 7) We(I) understand that it is our(my) responsibility to have reviewed the Trust/Estate Tax Return, Transmittals, and bank account information before signing the e-filing forms with the preparer and are aware of the content of the Trust /Estate Tax Return and whether the Trust/Estate is receiving a refund or if the Trust/Estate has a balance due.
- 8) All services must be paid in full before E-Filing.
- 9) **NO POST-DATED CHECKS WILL BE PERMITTED. There is a \$50 Bounced Check Fee.**
- 10) One copy of the Trust/Estate Tax Return will be given each year upon payment. Any additional copies of Tax Returns will require a \$25 fee.
- 11) All work papers and prepared trust/estate tax returns are the property of Rossman Tax Service. If the return is not prepared by us, we will return to the trustee all of their documents.
- 12) 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.

I (We) agree to and understand that by signing this engagement letter, I will submit my tax information no later than March 25, 2024. If I am not able to submit my tax information by this date, I understand that I must complete a Trust/Estate Extension Request Form and pay the \$75.00 Non-Refundable Trust/Estate Extension Request Fee by April 1st, 2024. I also understand if Rossman Tax Service prepares my Personal Income Tax Return, I must also submit A Personal Extension Request Form and pay an additional \$50.00 Non-Refundable Personal Extension Request Fee. I also acknowledge and understand that the extension only gives me additional time to file my tax return, if I owe money to the government, for Trust/Estate tax returns it is due and payable no later than April 15th, 2024, and personal tax returns are also due and payable no later than April 15th, 2024. THIS ENGAGEMENT IS LIMITED TO THE PREPARATION 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 SERVICES RENDERED IS NONREFUNDABLE.

Trust/Estate Name

Date Authorized Signature