

Hello & Thank You for Your Trust!

Please complete BOTH pages to this form. We look forward to serving you.

© H1 Tax Services Corp

LAST NAME FIRST NAME MIDDLE

DID WE PREPARE YOUR TAX RETURN LAST YEAR? **YES! I AM A RETUNING CLIENT :)** **NO THIS IS MY FIRST TIME :)**
Thanks & Welcome Back! *Awesome & Thank You!*

PLEASE PROVIDE US WITH CURRENT INFORMATION AND/OR HELP US CONFIRM DATA ON FILE FOR YOU:

I AM A US CITIZEN I WORKED ON EAD/H1/L1/L2
SSN (XXX-XX-XXXX) DOB (MM/DD/YYYY) I HAVE A GREEN CARD I WORKED ON OPT/F1/J1/M1

OCCUPATION EMAIL ADDRESS CELL PHONE NUMBER HOME PHONE NUMBER

STREET ADDRESS CITY STATE ZIP CODE

PLEASE PROVIDE YOUR CURRENT BANK ACCOUNT INFORMATION FOR DIRECT DEPOSIT OF TAX RETUNDS OR ACH PAYMENTS

CHECKING ACCOUNT
NAME OF BANK ROUTING NUMBER ACCOUNT NUMBER SAVINGS ACCOUNT

FILING STATUS

SINGLE MARRIED FILING JOINTLY MARRIED FILING SEPARATELY HEAD OF HOUSEHOLD WIDOW(ER)

BELOW IS A SET OF QUESTIONS ABOUT YOU AND/OR YOUR FAMILY AND LAST YEAR

If YES, Please Complete Our:

Were you married last year or have new children or dependents to claim?	<input type="checkbox"/> YES	SPOUSE & DEPENDENT FORM
Are you a first-time client who is married and/or have dependents to claim?	<input type="checkbox"/> YES	
Did you or your spouse commute out-of-state for WORK? (i.e. live in NJ, work in NYC)	<input type="checkbox"/> YES	STATE & MOVERS FORM
Did you or your spouse WORK in multiple states last year for 1 or more employers?	<input type="checkbox"/> YES	
Did you or LIVE in multiple states or change your state of residence last year?	<input type="checkbox"/> YES	
Did you own, buy, sell or refinance your primary residence last year?	<input type="checkbox"/> YES	REAL ESTATE TAX GUIDE
Did you own, managed or sell an investment property ANYWHERE in the world?	<input type="checkbox"/> YES	RENTAL INCOME FORM

HERE IS A QUICK TAX DOCUMENT GUIDE TO HELP YOU HELP US FILE YOUR TAXES

If YES, Please Also Submit Your:

Are you married and or have dependents to claim on your tax return?	<input type="checkbox"/> YES	WE MAY NEED PROOF
Did you earn income via employment, self-employment or commissions paid?	<input type="checkbox"/> YES	W-2 FORM or 1099-MISC
Did you receive payments from a pension or retirement account? (i.e. IRA, 401k, etc.)	<input type="checkbox"/> YES	1099-R FORM
Did you receive any disability payments or unemployment income?	<input type="checkbox"/> YES	1099-G FORM
Did you receive payments from the Social Security Administration?	<input type="checkbox"/> YES	SSA-1099 FORM
Did you have health insurance coverage?	<input type="checkbox"/> YES	1095 FORM
Did you make distributions or withdrawals from a Health Savings Account (HSA)?	<input type="checkbox"/> YES	1095-SA FORM
Did you make distributions or withdrawals from a College Savings Plan or 529 Plan?	<input type="checkbox"/> YES	1099-Q FORM
Did you pay for college tuition for you or someone else claimed on your tax return?	<input type="checkbox"/> YES	1098-T FORM
Did you earn any interest, dividends or buy or sell any securities in a taxable account?	<input type="checkbox"/> YES	Consolidated 1099 FORM
Did you serve as an owner, director, member or partner of any pass-through entity?	<input type="checkbox"/> YES	SCHEDULE K-1
Did you or your spouse make qualified childcare or dependent care payments?	<input type="checkbox"/> YES	Please Share Receipt
Did you or your spouse make a gift of \$15k or higher to any individual?	<input type="checkbox"/> YES	Please Share More Details
Did you make charitable donations to qualified charitable organizations?	<input type="checkbox"/> YES	Please Share Receipt

FOREIGN BANK ACCOUNTS, FOREIGN ASSETS AND FOREIGN TAXES

Your Answers Are Mandatory

Did you have foreign (Non-US) income or pay any foreign taxes last year?	<input type="checkbox"/> YES	You MUST Report
At any time last year, did you hold authority over a foreign bank or financial account?	<input type="checkbox"/> YES	Please Review USD Value
Did the aggregate value of all your foreign accounts exceed \$10,000 USD at any time?	<input type="checkbox"/> YES	FBAR/FACTA May Apply
IF FOREIGN ACCOUNTS DO NOT APPLY TO YOUR TAX RETURN, PLEASE CHECK HERE:	<input type="checkbox"/>	NO FOREIGN ASSETS/INCOME

RENTER'S CREDIT – APPLICABLE TO SOME STATES, INCLUDING NEW JERSEY

State Laws may change, but NJ, AZ, CA, HI, IN, IA, CT, MA, MD, MI, ME, MN, MO, RI, WI & VT have offered renter's credit before

If you paid rent last year towards your primary residence, please tell us your total rent paid: \$

Do you wish to approve H1 Tax Services Corp. to prepare your tax return this year? YES *Please See Page 2 of 2!*



REQUIRED: PLEASE READ & SIGN

CLIENT ENGAGEMENT AGREEMENT FOR 2018/2019

This letter summarizes the terms of our tax return preparation engagement and the nature and extent of the services provided to you by H1 Tax Services Corp. We require your acceptance before we can begin work on your behalf. Thank you in advance for your time and trust!

H1 TAX SERVICES CORP'S RESPONSIBILITIES AND DUTIES:

- We will prepare your federal and state income tax returns from information that you will provide us for each tax year requested
- We reserve the right to ask for more information to clarify your tax information, but we will not audit or otherwise verify your data
- The only accounting or analysis work done will be necessary for the preparation of your tax return
- Bookkeeping, QBI Calculations, Asset Sale Calculations, Conversion of Foreign Tax Data & Consultations are performed for additional fees
- Your tax return will be electronically filed whenever possible after you have reviewed the documents and signed all required forms

YOUR RESPONSIBILITIES AND DUTIES:

- It is your responsibility to provide all the information required for the preparation of a complete and accurate tax return
- 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 should keep original copies of forms and records for at least 7 years
- You have the final responsibility for the income tax returns. Therefore, you should review them carefully before you sign them.
- You agree to remit payment for all work performed on your behalf. To stop work, you must inform us in writing.

PROFESSIONAL JUDGEMENT:

- Our firm will use our best judgement and professional experience to resolve any questions and issues regarding your tax return
- If necessary, we will request additional information or provide additional services that may require more time, calculation and fees
- Failure to provide additional information or approve additional services may result in processing delays or termination of services

PENALTIES

- Our common goal is to comply with all tax laws and resolve all conflicts of interpretations without raising the risk of audit
- Tax law imposes penalties when taxpayers understate their liabilities or fail to file and pay tax obligations in a timely manner

EXTENSIONS:

- An extension of time to file your tax returns is not an extension of time to pay your tax obligations
- Our office retains the right to charge a fee for calculating estimated tax payments that may or may not accompany your extension request

FEES, ESTIMATES & CONSENT TO HIRE H1 TAX SERVICES CORP TO PREPARE YOUR TAX RETURNS:

- Our firm will always provide you a firm estimate of total tax return preparation costs before beginning work
- Our fee is based upon the complexity of the schedules and/or time required, plus any out-of-pocket expenses
- Your verbal agreement or emailed consent is considered confirmation for H1 Tax Services Corp to begin preparing your tax return
- In most cases, the estimated fee will be the total fee or total cost to prepare your complete tax return
- If necessary, our office will communicate any increase in fees for additional work required
- Payment is due immediately upon receipt of your tax return and/or calculated tax liability

To confirm your understanding, please sign below. We sincerely appreciate each opportunity to work with you.

Your Name & Affirmation

Your Spouse's Name & Affirmation

Date (MM/DD/YYYY)

PLEASE SIGN

CONSENT TO PROVIDE FINANCIAL ADVICE & SERVICES USING TAX DATA

We must record your consent and approval to do what we do best – save you money in taxes. One of the main ways we accomplish this goal is to provide financial planning advice specific to your needs. Your tax return data is used to customize our advice to you.

Federal law requires this consent form be provided to you. **Unless authorized by law, we cannot use your tax return information for purposes other than the preparation and filing of your tax return without your consent.**

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

You hereby authorize our firm to use all of your tax return information provided for the purpose of providing you with information pertaining to various financial services and products, which may include, but are not limited to, financial planning, investment advice and investment products. You are NOT obligated to accept these offers, purchase any financial services and or follow the financial advice given. HD Vest can be contacted by phone at (972) 870-0600.

I understand that Rasik Machchhar and Shaan Machchhar are affiliated with H.D. Vest Investment Servicessm (HD VEST), a registered broker-dealer, as an independent contractor solely for the purpose of offering financial products and services. HD VEST does prepare income tax returns or provide tax advice. I understand that H1 TAX SERVICES CORP is not a registered broker-dealer.

I/We authorize H1 Tax Services Corp. and its team to use the information provided during the preparation of my/our tax returns in order to provide specific and custom financial advice and services that I may benefit from. This consent is valid for 3 years.

If you prefer a more limited duration: I/We specify the duration of the above consent to be _____ year(s) from date of affirmation.

Your Name & Affirmation

Your Spouse's Name & Affirmation

Date (MM/DD/YYYY)

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov.