



ADMORR

Client Service Agreement Tax Season 2020 – Tax Year 2019

Thank you for choosing ADMORR Tax Services, LLC. We appreciate the opportunity to prepare your 2019 federal and state tax returns. This Client Service Agreement explains what to expect from your tax preparer and/or from other companies that may provide products or services to you.

We will conduct a brief consultation and interview (either in person or electronically) to access and collect needed information to prepare and complete accurate returns. The following items are covered by this Client Service Agreement in order to ensure an understanding of our mutual responsibilities as tax preparer and taxpayer/filer:

- 1. ADMORR, LLC. Documentation Requirement** - We will prepare your federal and state individual/business income tax returns. These returns will be prepared from information furnished by you. We will not audit or make any other verification on the data you submit. However, it may be necessary to ask you for clarification of some of the information. We will furnish you with an electronic checklist to help you gather the necessary information (please note this list is not comprehensive, any forms you are unsure of should be submitted to us prior to start of tax preparation). In the event of an audit by a taxing authority, you will be required to provide the documentation for all items in question to the taxing authority. It is the taxpayer(s) (you) responsibility to obtain or retain all documentation that supports your tax liability, credits and deductions claimed.
- 2. Client Documentation Responsibility**- It is your responsibility to provide all the information required for the preparation of a complete and accurate tax return. You should retain all documents, cancelled checks and other data that form the basis of income, credits and deductions for at least the minimum statute of limitations (typically 3 years, but can be unlimited in certain situations). You should also retain documents that support items carried over from prior years or open years, such as cost basis information, net operating losses, etc. This information may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility to ensure the accuracy of your income tax returns; therefore, you should review them carefully before you sign.
- 3. Amendments** - If for some reason you discover that you did not provide complete and accurate information, you agree to file amended tax returns. ADMORR, LLC. is happy to prepare any amendment needed, but there may be an additional fee.
- 4. Supplemental Document Preparation by ADMORR, LLC.** - Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover errors or omissions by you, fraud, misrepresentations, defalcations and/or other irregularities, should any exist. We will perform basic accounting and bookkeeping services only as determined necessary for the preparation of your tax returns. It is your responsibility to provide us with accurate, complete, and truthful information for use in preparing your tax forms. We will use professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authority & the taxpayer's interpretation of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor when possible.
- 5. Fees** - Our fees are based upon a standard rate schedule for the complexity and type of forms required to be filed. Invoices are due and payable Presentation. Upon receipt of your tax preparation fees and signed required documents (i.e. form 8879), your return will be electronically filed, if applicable, with the appropriate taxing authorities.
- 6. Representation/Audit Assistance** - Your returns may be selected for review for any reason by the taxing authorities. If you receive an audit letter about a return prepared by ADMORR, LLC. and it has been determined that ADMORR, LLC. is at fault, we will assist you in solving any issues that arise at no charge. If ADMORR, LLC. was not at fault or did not prepare the return being audited, assistance is available at standard billing rates. Moreover, the taxing authorities may correspond with you regarding your tax return. You agree to timely forward this correspondence to us for review and analysis. ADMORR, LLC. will be available year-round to answer your tax questions and help you with your tax planning needs. Additional fees may be charged depending upon the response required.
- 7. Completed Returns** - Completed tax returns (or a copy) will be provided following full payment of services rendered or the client has agreed to have payment deducted from tax return refund. You may have a copy of the return delivered as a hard copy via email (secure PDF) or placed onto a scan disk. For the protection of your identity, we will not fax copies of completed returns.

Please acknowledge that you have read and agree to the terms and conditions set forth above by signing below:

Thank you for your trust in our professional tax preparation services.

Printed Name of Taxpayer: _____

Taxpayer Signature: _____ Date: _____

Printed Name of Joint Taxpayer: _____

Joint Taxpayer Signature: _____ Date: _____



Consent to Disclosure of Tax Return Information

_____ ("we," "us" and "our")
Printed name of taxpayer

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than those related to the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form. Because our ability to disclose your tax return information to another tax return preparer affects the tax return preparation service(s) that we provide to you and its (their) cost, we may decline to provide you with tax return preparation services or change the terms (including the cost) of the tax return preparation services that we provide to you if you do not sign this form. If you agree to the disclosure of your tax return information, 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.

In order to process your return we must disclose all of your 2019 tax return information to that we partner with in order to provide certain services. If you will allow us to disclose your 2016 tax return information to for this purpose, sign and date your consent to the disclosure of your tax return information.

By signing below, you (including each of you if there is more than one taxpayer) authorize us to disclose to all of your 2019 tax return information. If you are not willing to authorize us to share your tax information with the other firms, you can still choose to have your tax return prepared and filed by us for a fee.

Printed Name of Taxpayer: _____

Taxpayer Signature: _____ Date: _____

Printed Name of Joint Taxpayer: _____

Joint Taxpayer Signature: _____ Date: _____

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 e-mail at complaints@tigta.treas.gov.



ADMORR

PRIVACY NOTICE
Effective January 1, 2020

Protecting your privacy is important to us.

We are providing you this privacy notice as required by law. This privacy notice explains the types of information we may collect from and about you or your business, how we may use or disclose that information, and how we protect that information.

Who This Privacy Notice Covers

This notice applies to personal and business information we collect when we provide tax preparation and other products and services to customers of ADMORR Tax Services, LLC.

Information We May Collect

We collect various pieces of information about you, your spouse, your dependents, your business, and other individuals. This information may include:

Contact Information (e.g., email and phone number)

Dates of Birth

Social Security Numbers and other government or state Identification numbers (e.g., EIN and ITIN);

Financial Information (e.g., income and expenses)

Payment Data (e.g., checking, debit/credit accounts no.)

Payroll Information (related to business services);

Demographic Information.

We collect this information from the following categories and sources:

Information you voluntarily provide. If you choose not to provide certain information we request; we may be unable to serve you as our products, services, tools or calculators may rely upon this information.

Information related to transactions that you complete or propose to complete with us, our affiliates, our franchisees or certain nonaffiliated third parties.

Information from the Internal Revenue Service (IRS), other government entities, and certain non-affiliated third parties (e.g. Credit reporting agencies).

How We May Use or Disclose Information About You

Our use and disclosure of your information is controlled by various laws, regulations and other legal requirements. We may use or disclose information that we collect, subject to the terms of this privacy notice and consistent with applicable law. By providing your personal information, you give us consent to use the information only for the purpose for which it was collected. We will ask for your consent before using the information you provide for any secondary purpose other than those required by federal law.

- We do not sell or rent your information to third-party direct marketers.
- We may disclose your information to affiliates or non-affiliated third parties (including government entities) when we have a good faith belief that such disclosure is required or permitted by law. This may occur, for example, in connection with a court order, legal process, or other judicial, administrative or investigative proceeding. This may occur in other situations as part of our business operations.

How We Protect Your Information

We maintain physical, electronic and administrative policies and procedures designed to restrict access to your information. These include programs and specifications for physical security and records retention and disposal as required by the IRS; computer and communication security measures reflected in system design, password protection, and data management practices; and other measures to restrict access to the data we hold in physical and electronic forms.

How You May Control Use of Your Information

We will use reasonable efforts to comply with your requests regarding your information. From time to time, it may be necessary to send you information about transactions or accounts you have with us.

We reserve the right to change this privacy notice and any of the policies described in this notice at any time, consistent with applicable law. If we make a material change to this notice, we will notify you by using one of the following methods: (1) we will post a notice on our web site describing the change; or (2) we will hand deliver or send you regular or electronic mail notifying you of the change.