



## DP Financial & Tax, Inc.

8282 S. Memorial Dr, Suite 102 • Tulsa, OK 74133  
Phone: (918) 392-7879 • Fax: (918) 392-7079

### 1040 – INDIVIDUAL 2010 TAX RETURN ENGAGEMENT DOCUMENT

#### PURPOSE

The purpose of this document is to confirm our agreement with you relative to the tax services we will perform. We will prepare your federal and state individual income tax returns for 2010 and declarations of estimated tax as needed from the information submitted by you. All tax returns will be electronically filed unless paper filing is required. Our work in connection with the preparation of your income tax returns does not include an independent verification of the data you submit, although we may ask you to clarify some of the information.

#### VERACITY OF INFORMATION

To the best of your knowledge, you hereby confirm that all the information submitted to our firm is correct and includes all income, deductions, and other information necessary for the preparation of the above returns. Furthermore, you acknowledge that it is your responsibility to provide all the information required for the preparation of complete and accurate returns.

#### DOCUMENT RETENTION

We urge you to retain all the documents, canceled checks, and other data, including but not limited to mileage logs and gambling winnings and losses logs, 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 sign them.

#### AUTHORIZATION TO USE PERSONAL JUDGEMENT

You authorize our firm to 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.

#### CONSENT TO USE TAX INFORMATION

You authorize our firm to use your tax information for administrative purposes and for quality or peer review. Input or review can be done in office or by secure remote access by DPFT employees and/or seasonal contract preparers. All paid personnel have access to your tax information for administrative and input purposes in preparing your return as well as for quality review purposes.

#### FEES/PAYMENT

Our fee for these services will be based upon the amount of time required at our standard billing rates plus out-of-pocket expenses. Any services for hourly accounting, tax letter responses, amended return preparation, or tax representation will be billed separately. All invoices are due and payable upon presentation.



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### **RETURN PICKUP**

Each tax return engagement entitles you to a 30-minute meeting when you pick up the tax return. The purpose of the meeting is to review the tax return and answer any questions you may have about the return. If you need additional meeting time, you may request it at our standard hourly rate of \$75.

### **CONFIDENTIALITY**

We are pleased to have this opportunity to service you and want to assure you that all of your financial documentation is kept private and confidential. Release of this documentation by our firm to any third party will need to be requested in writing.

### **EXTENSION AUTHORIZATION**

Client(s) agree that if the tax return is not completed by April 1, 2011 an extension of time to file will automatically be prepared at a cost of \$75. The prior year's tax due/refund will be reported as the estimated amount owed or to be refunded unless the client provides us with different figures to be submitted. Please note, this would be an extension of the return filing but NOT of the tax due. The IRS will expect payment of any estimated tax due by April 15<sup>th</sup>.

### **PRICE QUOTE**

The following is our price quote range for your 2010 individual 1040 tax return. **This is an estimate only**; therefore, the dollar amount could increase or decrease based on the complexity of the return and the time our firm spends preparing the return. This quote is for the preparation of the tax return(s) only. **Any accounting services necessary to prepare the return(s) will be billed in addition at \$75/hour.**

Tax Return Price Quote Range: \_\_\_\_\_

**PLEASE NOTE: PAYMENT IS DUE AT THE TIME THE TAX RETURN IS PICKED UP.**

Taxpayer Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Taxpayer Name: \_\_\_\_\_