

THANK YOU FOR YOUR TIME & TRUST!

© H1 TAX SERVICES CORP

Taxpayer's Last Name

Taxpayer's First Name

Middle Initial

Did H1 Tax Services Corp file your taxes last year?

Yes! I am a Returning Client to H1 Tax Services Corp
Thank You Very Much!

No. I am a New Client. This is my first time filing with you.
Awesome! Please complete ALL pages in this form.

If you are RETURNING CLIENT who filed your tax returns with us last year, please tell us:

NO CHANGES to my ADDRESS on FILE
 NO CHANGES to my MARRIAGE STATUS
 NO CHANGES to my FAMILY, keep the same as last year
 I need to report RENTAL INCOME or LOSSES

I need to UPDATE MY ADDRESS
 I got MARRIED or DIVORCED and need to share information
 I need to ADD/REMOVE CHILDREN OR OTHER DEPENDENTS
 I want auto, home and/or life insurance quotes to review

NOTE: If needed, you can find additional forms like the RENTAL INCOME FORM online at <https://www.h1fits.com/taxes-forms/>

REQUIRED - Please Confirm Your Best Contact Information and Bank Details for Tax Refund & Our Fees

Street Address

City or Town

State

Zip Code

Email Address

Cell (XXX-XXX-XXXX)

Home (XXX-XXX-XXXX)

This is a CHECKING account

Name of Bank

Routing Number

Account Number

This is a SAVINGS account

REQUIRED – Foreign Bank Accounts, Foreign Assets, Foreign Income & Taxes

Did you have foreign income or pay any foreign taxes last year (including non-US rental income)?

YES NO

At **any time** last year, did you have an interest or signature authority over any non-US bank account?

YES NO

At **any time** last year, did you have an interest or signature authority over any non-US financial account?

YES NO

- If **YES**, did the aggregate value of all non-US accounts ever exceed **\$10,000** at **any time**?

YES NO

- If **YES**, did the aggregate value of all non-US accounts ever exceed **\$50,000** at **any time**?

YES NO

REQUIRED – Bitcoin, Cryptocurrency, Virtual Currency

At **any time** last year, did you receive, sell, send, exchange or hold a financial interest in virtual currency?

YES NO

TESLA, ELECTRIC VEHICLE CREDIT TAX CREDIT

Did you purchase a TESLA or an electric vehicle last year? (If **YES**, please share details required below)

YES NO

Vehicle Make & Model (i.e. Tesla Model 3)

Model Year

Purchase or Order Date

Date of Delivery or Use

VIN or Vehicle Identification Number

Battery Capacity (kwh)

Gross Vehicle Weight (lbs)

RENTER'S TAX CREDIT

If possible, we will claim a credit for the **rent** that you paid towards your primary home. **TOTAL RENT PAID:** _____

Required: Please Take a Moment to Read our Client Engagement Agreement (Page 2) and Provide Your Approval for Next Steps

ENGAGEMENT LETTER – PLEASE SIGN & APPROVE

We Deeply Value Your 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, cancelled 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 of TIME TO FILE TAX RETURNS

- 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
- Our office retains the right to pause, hold or postpone the e-filing of your tax returns until all invoices and fees are paid or cleared

PLEASE PROVIDE YOUR APPROVAL BELOW. THANK YOU IN ADVANCE FOR THIS OPPORTUNITY TO SERVE YOU!

Taxpayer's Signature / Affirmation

Spouse's Signature / Affirmation (if applicable)

Date

Next Steps:



***If you are a RETURNING CLIENT with NO CHANGES or UPDATES to your address or family...
PLEASE SAVE YOUR CHANGES & RENAME THE FILE before your UPLOAD or SUBMIT this form.***



***If you are a NEW CLIENT or a RETURNING CLIENT who needs to share UPDATES...
PLEASE COMPLETE THE NEXT PAGE(S) of this form. We need more information from you.***

Client Information Worksheet – All New Clients Must Complete

PRIMARY TAXPAYER – Please complete the following to update your profile or to begin filing taxes with H1 Tax Services Corp:

Taxpayer's Last Name _____ Taxpayer's First Name _____ Middle Initial _____

Social Security Number _____ Occupation, Position or Title _____ Date of Birth _____

PROOF OF ID:	
<input type="checkbox"/>	Driver License
<input type="checkbox"/>	State ID

US Citizen Green Card EAD/ H1/H4/L1/L2 OPT / F1 /J1 / M1 **Note Change in Status**

SPOUSE – Please tell us more about your Husband or Wife (if applicable)

Spouse's Last Name _____ Spouse's First Name _____ Middle Initial _____

Social Security Number / ITIN* _____ Occupation, Position or Title _____ Date of Birth _____

*You can apply for ITIN

PROOF OF ID:	
<input type="checkbox"/>	Driver License
<input type="checkbox"/>	State ID
<input type="checkbox"/>	Passport

US Citizen Green Card EAD/ H1/H4/L1/L2 OPT / F1 /J1 / M1 **Note Change in Status**

DEPENDENT 1 – Please tell us more about your Son, Daughter, Parent or Relative (if applicable)

Dependent's Last Name _____ Dependent's First Name _____ Middle Initial _____

Social Security Number / ITIN* _____ Occupation, Position or Title _____ Date of Birth _____

*You can apply for ITIN

PROOF OF ID:	
<input type="checkbox"/>	School/State ID
<input type="checkbox"/>	Report Card
<input type="checkbox"/>	Medical Record

US Citizen Green Card EAD/ H1/H4/L1/L2 OPT / F1 /J1 / M1 **Note Change in Status**

RELATIONSHIP: Son Daughter Parent Other Relative / Person

DEPENDENT 2 – Please tell us more about your Son, Daughter, Parent or Relative (if applicable)

Dependent's Last Name _____ Dependent's First Name _____ Middle Initial _____

Social Security Number / ITIN* _____ Occupation, Position or Title _____ Date of Birth _____

*You can apply for ITIN

PROOF OF ID:	
<input type="checkbox"/>	School/State ID
<input type="checkbox"/>	Report Card
<input type="checkbox"/>	Medical Record

US Citizen Green Card EAD/ H1/H4/L1/L2 OPT / F1 /J1 / M1 **Note Change in Status**

RELATIONSHIP: Son Daughter Parent Other Relative / Person

Next Steps:



THANK YOU FOR YOUR TIME & EFFORT!

If complete, you may visit our website to [UPLOAD](#) or [SUBMIT](#) this form with your tax docs.

Our office will contact you within 1 BUSINESS DAY to confirm a quote for fees, share info and next steps