

Elite Tax and Financial Services, LLC

CORPORATE INFORMATION FORM

Tax Year _____

Corporate Information

Name: _____ EIN # _____ - _____

Address _____ Date Corp Opened _____

City _____ State _____ Zip _____ County _____

Type of Corporation C _____ S _____ Date of S Corp Election _____

State in which the Corporation was formed _____ # of Shareholders _____

Business Activity _____

Fiscal Year if different from Calendar Year _____

Initial Return _____ Final Return _____ Address Change _____ Amended Return _____

Contact Information

Name of Officer _____ SS # _____

Title of Officer _____ Percentage of Ownership _____ %

Address _____

Contact E-mail: _____ Contact Cell Phone: (_____) _____

Name of Officer _____ SS # _____

Title of Officer _____ Percentage of Ownership _____ %

Address _____

Contact E-mail: _____ Contact Cell Phone: (_____) _____

Name of Officer _____ SS # _____

Title of Officer _____ Percentage of Ownership _____%

Address _____

Contact E-mail: _____ Contact Cell Phone: (_____) _____

Name of Officer _____ SS # _____

Title of Officer _____ Percentage of Ownership _____%

Address _____

Contact E-mail: _____ Contact Cell Phone: (_____) _____

All information I have given is true and correct to the best of my knowledge.

_____ Date: _____

Officer's Signature

Client Name: _____ Tax Years Covered: _____

Corporation Engagement Letter

To: *Elite* Tax and Financial Services, LLC

I have engaged your firm to prepare both my S Corporation (1120S) Federal and state of North Carolina income tax returns or any other state as applicable. *I am aware that this engagement is only for the tax preparation of the Corporations's tax returns. Elite Tax will have another engagement for any QuickBooks work or QuickBooks help. I am aware Elite Tax does not prepare or have anything to do with payroll. I am aware that if I have questions regarding payroll or QuickBooks help then I will be charged a fee for this consultation service.* I also understand that it is my responsibility to provide you with all the information required to **complete my tax return only**. In that regard I state that, to the best of my knowledge and belief:

(Please initial on every line, verifying that you have read and understand what is required of you)

____ 1. I have provided true, correct, and complete information regarding my Corporate income and expenses as listed on my Profit and Loss from QuickBooks that has been completely reconciled for the tax year. Also written summaries will be provided if available. I will provide tax preparer with bank statements and any data needed to help in the preparation of the returns.

____ 2. I will retain for at least **four years** all the documents, receipts, canceled checks, and other records required to substantiate the items of income and expense claimed on my return.

____ 3. I understand that if a question arises regarding the interpretation of tax law, that Elite Tax will use their professional judgment in resolving the issues. Elite Tax will not audit the information but might ask for clarification.

____ 4. I understand that there might be deductions that are not allowed by law and Elite Tax will not take these deductions.

____ 5. ***I understand that I will be charged an additional fee if I asked for assist or represent me in a tax audit, examination, or inquiry.*** I understand that, in the *event of preparer error*, I am responsible to pay the additional tax that may be due and interest, but that the extent of ***Elite Tax's responsibility is to pay for any penalty*** that the IRS or the above stated revenue department may assess. This is only if Elite Tax gets the letter within **30 days of my receipt of the letter.**

____ 6. I will contact you **IMMEDIATELY** if I discover additional information that will lead to a change in my return, or if I receive any letters from the IRS or state taxing authorities.

____ 7. ***I understand that your bill will be due and payable upon completion of these returns unless in the off-season Elite Tax will get at least half of the estimated bill amount, and that additional services will not be performed until the bill for these services is paid in full.***

____ 8. ***I understand that Elite Tax's bill will be based upon a schedule of tax form prices that were prepared and any additional work that was done to prepare the tax return.***

I have read, understand, and accept the conditions of the engagement letter as discussed above.

Officer Signature _____

Date _____