



Dear Client,

We appreciate the opportunity of working with you and advising you regarding your income tax. The Internal Revenue Service impose penalties upon taxpayers and upon us, as tax preparers, for failure to observe due care in reporting for income tax returns. All self-employed individuals MUST provide the documentation of all income and expenses.

The law provides various penalties that may be imposed when taxpayers understate their tax liability. In order to ensure and understand our mutual responsibilities, we ask all our clients for whom we prepare tax returns to confirm the following arrangements.

We will prepare your Federal and required State Income Tax Returns from the information, which you provide us. We will make no audit or verification of the data you submit, although we may need to ask for clarification of some of the information. It is YOUR responsibility to provide us with ALL the information required for the preparation of complete and accurate returns. You should retain all the documents, cancelled checks and other data necessary to prove the accuracy and completeness of the return to the IRS.

You have the final responsibility for the Income Tax returns and therefore, you should review them carefully before you sign them. Our work in connection with the preparation of your Income Tax Return does not include any procedures designed to discover misrepresentation or other irregularities, should any exist.

returns.

We will render such accounting and bookkeeping assistance, as we find necessary for preparation of the income tax

Your returns may be selected for review by the IRS. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination, we will be available, upon request, to represent you and will render additional invoices for the time and expenses incurred. Our fee for those services will be based upon the amount of time required at our standard billing rates. All invoices are due upon receipt.

All clients are required to pay for services rendered at the time of their visit. Our fee is not contingent on your getting a refund. If you select our fee to be paid from your refund, and we are not paid, you still owe us our fee.

Special Note: Please be sure to inform us of any foreclosure, short sale or debt forgiveness, as well as any unemployment or disability benefits received.

It has been our pleasure to work with you. Thank you for choosing MB Accounting and Tax Service.

Sincerely,

Kristen Blazevich Hobbs

Kristen Blazevich Hobbs

Client Signature: _____ Spouse Signature: _____

DAY CARE INFORMATION:

NAME OF DAYCARE: _____

FEDERAL ID #: _____

PHONE NUMBER: _____

ADDRESS: _____

CITY: _____

STATE: _____

ZIP CODE: _____

CHILDREN WHO ATTEND: _____

CHECK ONLY WHAT APPLIES TO YOU

1. DO YOU OWN YOUR OWN HOME? _____
2. DO YOU HAVE MEDICAL INSURANCE YOU PAY FOR? _____
3. DO YOU HAVE COLLEGE LOANS YOU ARE PAYING FOR? _____
4. DID YOU TAKE ANY COLLEGE CONTINUING EDUCATION COURSES? _____
5. DID YOU PAY FOR CHILD CARE FOR YOUR CHILDREN? _____
6. DO YOU HAVE ANY CHILDREN GOING TO COLLEGE? _____
7. DO YOU HAVE ANY ELDERLY PARENTS OR FAMILY LIVING WITH YOU? _____
8. DID YOU HAVE A HOUSE FORECLOSED OR SHORT SALED THIS YEAR? _____
9. DO YOU HAVE ANY FORGIVEN OR SETTLED CREDIT CARD DEBT? _____
10. DID YOU RECEIVE UNEMPLOYMENT BENEFITS FOR THE YEAR OF 2018? _____
11. DID YOU FILE OR HAVE A BANKRUPTCY DISCHARGED IN THE YEAR OF 2018? _____
12. DID YOU SELL A CAR, TRUCK, TRAILER, BOAT OR ANYTHING ELSE NEEDING A TAG? _____
13. DO YOU HAVE INVESTMENTS OR ACCOUNTS LOCATED OUT OF THE UNITED STATES? _____
14. DID YOU MOVE TO ANOTHER STATE IN 2018? _____
15. DID YOU DIVORCE OR MARRY IN THE YEAR OF 2018? _____
16. DID YOU HAVE ANY CHILDREN BORN IN 2018? _____
17. DID YOU HAVE ANY CHILDREN LEAVE HOME IN 2018? _____
18. DID YOU BUY A NEW VEHICLE IN 2018? _____

DIVORCE DATE: _____

MARRIAGE DATE: _____



TAX RETURN REVIEW ACKNOWLEDGEMENT

I/WE _____
HAVE REVIEWED MY FINAL 2018 TAX RETURN WITH MB ACCOUNTING AND TAX SERVICES, AND I/WE AGREE, TO THE BEST OF MY/OUR KNOWLEDGE, ALL INFORMATION IS TRUE AND CORRECT. I HAVE PROVIDED ALL INCOME, EXPENSES, AND ANY OTHER INFORMATION REQUIRED FOR THE PREPARATION OF MY 2018 FEDERAL AND STATE TAX RETURNS.

AS A SELF-EMPLOYED INDIVIDUAL, I UNDERSTAND IT IS MY RESPONSIBILITY TO KEEP ALL RECEIPTS AND RECORDS USED FOR THE COMPLETION OF MY TAX RETURN, IN CASE OF REVIEW OR AUDIT.

TAXPAYER:

SPOUSE:

TAX PREPARER:

2018 DISCLOSURE FORM

Federal law requires this consent form to be provided to you. Unless authorized by law, we cannot disclose, without your consent, your tax return information to third parties for purposes other than the preparation and filing of your tax return and, in certain limited circumstances, for purposes involving tax return preparation. 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 service that we provide to you and its cost, we may decline to provide you with service or change of terms of service that we provide you if you do not sign this form. If you agree to the disclosure of your tax return information, your consent is valid for that amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year.

Duration of consent (optional): _____

I, _____ authorize **MB ACCOUNTING & TAX SERVICES INC./KRISTEN HOBBS** to disclose all income and expenses to prepare 2018 Income Tax Return to the United States Treasury for the purpose of filing 2018 Income Tax Return.

Note: If there are multiple reasons for requesting disclosures they may all be listed in one consent form. See Revenue Procedure 2008-35, section 6 for examples.

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.

TAXPAYER SIGNATURE:

SPOUSE SIGNATURE:

TAX PREPARER SIGNATURE:

DATE: