



DBW TAX SERVICES

CLIENT FIDUCIARY AGREEMENT

Thank you for choosing DBW TAX SERVICES to assist you with your 2020 Income Taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your 2020 federal, State & Local income tax returns (if needed). We will depend on you to honestly provide the information we need to complete the returns accurately. We may ask you to clarify some items but will not audit nor verify the data you submit.

We will perform accounting services only as needed to prepare your tax returns. Our work will not include bookkeeping or financial advice. Our engagement should not be used to obtain personal info, of an ex-spouse, significant other or other parties. We will, of course inform you of any accounting errors, fraud, or other illegal acts we discover.

The law imposes penalties when taxpayers underestimate their tax liability. Therefore, it is imperative that you disclose information only pertaining to your affairs and that you are responsible for, should we determine that you have disclosed or knowingly provided false or fictitious information. We reserve the right to decline our services and take no responsibility or association with your treachery behavior.

Our fee will be based per form as needed. Invoices are due and payable upon presentation, by the method of your choice. To the extent permitted by state law.

We will return your original records to you at the end of this engagement. You should securely store these records, along with all supporting documents, canceled checks, etc. as these items may later be needed to prove accuracy and completeness of a return. We will retain copies of your records and our work papers for your engagement for 3 years, after which these documents will be destroyed.

Our preparation of your 2020 tax returns will end with delivery of the completed returns to you (if paper-filing), or your signature and our subsequent submittal of your tax return (if e-filing). Review all tax-return documents carefully before signing them.

I agree to the terms of the above client agreement. I also grant permission to my parent or my appointed authorized representative to submit my tax forms to DBW TAX SERVICES LLC. to be prepared and to discuss all tax related issues. It is understood I must follow up with the office to retrieve my completed paperwork or make other arrangements approved by management. Initials

Your signed forms will be submitted to your Tax Preparer and retained for IRS review. (if needed)

Taxpayer

Date

Name of person you allowed to give us your info.



Taxpayer name:

Additional information, new information and updates. **If no Stimulus payments received enter zero.**

1st Stimulus payment in 2020:

2nd Stimulus payment:

In 2020, if you were self employed from April 1 - Dec. 31 were you sick or needed time to care for someone sick? If yes, enter dates _____ and/or needed time to care for children during school closing, due to Covid-19? If yes, enter dates.

Current or New Address and phone number

Refund and Payment Options: Choose one (Fees apply when tax prep fees are withheld from your refund.)

Direct deposit (fees apply with RT direct deposits. See bank info for details)

1. All new clients or existing clients with new direct deposit info enter bank routing and account number.

Checking Savings

2. Existing clients using the previous year direct deposit info, enter the last 3 numbers of your bank account to confirm: _____

Prepaid Card (fees apply see bank info for details)

Would you like a Visa prepaid card? _____

Santa Barbara bank issued check (fees apply see bank info for details)

Would you like a SBTG bank issued check? _____

No additional fees apply if you choose to pay your tax preparation fee upfront to our office. To do so, select one of our payment options on our website home page.

Would you like to pay upfront? _____

No returns are submitted unless payment and signatures are secured.