



IRS E-FILE ATC TAX IRS E-FILE

17310 Stuebner Airline Rd. Spring, TX 77379
Office (281) 374-6351 Fax (281) 596-7519

CLIENT QUESTIONNAIRE
TAXPAYER

Name _____
(First) (Middle) (Last Name)

SSN _____

Occupation _____

Date of Birth _____

Phone (Home) _____ (Cell) _____
opt-in to receive text _____ Cell Provider _____

Marital Status: Single _____ Married _____ Married but separated _____ Divorced _____ Widowed _____

e-mail _____

Address _____
(Street, City, State, Zip Code)

Are you a prior Client _____ Yes _____ No
SPOUSE

Name _____
(First) (Middle) (Last Name)

SSN _____

Occupation _____

Date of Birth _____

Phone (Home) _____ (Cell) _____
opt-in to receive text _____ Cell provider _____

CHILDREN OR DEPENDENTS

NAME	RELATIONSHIP	DATE OF BIRTH	SOCIAL SECURITY NUMBER	MONTHS LIVED W/TP

CHILD CARE

NAME	ADDRESS	SSN/EIN	AMOUNT

Bank account Routing# _____ Account# _____

OTHER INCOME:

Interests in Bank Accounts (Saving, CD,s) Amount \$ _____

Dividends, Stocks Amount \$ _____

Unemployment Compensation Amount \$ _____

Education Expenses Amount \$ _____

Taxpayer(s) Signature

DATE _____



Affordable Care Act Questionnaire

What (if any) health insurance did you or your dependents have in last year? (Attach a copy of your insurance card or bring it to your appointment)

1. ___ Medicare
2. ___ Medicaid
3. ___ Private employer
4. ___ Private insurance
5. ___ Government Marketplace
6. ___ Other (Such as Veterans Affairs) _____

List all members of the family. For each member list the months (if any) he or she had health insurance (if a member had health insurance for one day during the month, he or she is treated as having insurance for the entire month)

Name	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec

Did you receive a Form 1095? Yes ___ No ___ (If yes, attach a copy or bring it to your appointment)

If you have insurance from the Government Marketplace:

- A. How many children are your dependents? _____ (Attach a copy of their tax return(s) if they filed or bring it to your appointment)
- B. How many children are dependents of another taxpayer? _____
- C. Did you receive a subsidy from the Marketplace that reduced the monthly premium for your insurance (also called an Advance Premium Tax Credit)? Yes ___ No ___ If yes, what was the monthly subsidy?

Signature _____ Date _____
Tax Payer

Permission Slip/Engagement Letter

ATC TAX SERVICE 17310 STUEBNER AIRLINE RD SPRING, TX 77379

This permission Slip/Engagement Letter is to confirm the arrangements for our tax return preparation services. We will prepare your individual and/or Business Federal and State Tax returns for calendar year _____ in accordance with appropriate tax laws and regulations. Your returns will be prepared solely from the information provided by you! For speedy completion of your taxes, please provide any information promptly to our office, if we ask for it. All information is kept confidential! **No one get your information from us without your permission, except for a government following due process law.**

ALL TAX PREPARATION FEES ARE DUE AND PAYABLE AT THE TIME OF PREPARATION OR PICK UP YOUR COMPLETED RETURN(S). THIS YEAR WE ARE REQUIRING A 50% PREPAY ON TAX PREPARATION WITH BOOKKEEPING AT THE TIME OF THE INTERVIEW OR DROPP OFF.

TAX PREPARATION SERVICES are based on fee schedule charged per form(s) scheduled needed to complete yours return(s). Fee schedules are displayed on the invoice. Additional charges may include research basis of stocks/bonds or assets sold, NOL's multi-state returns filed, and accounting for an entire year, tax consultation for estimates, amended taxes for prior or current year, FAFSA reports, which are identified separately on your invoice.

OTHERS SERVICES provided: Tax audit, tax estimates, accounting, payroll, business consultation, corporation formation, set up of new business, and other services. Theses are billed at an hourly rate or flat rate and paid on the day of the appointment.

Minimun fee of \$35.00 for any letters we write to IRS or any State Agencies at your request in response to a letter from them. We must have written authorization for any fax request from banks, schools, colleges, etc. There will be a \$35.00 minimun charge, payable before we fax th information requested.

Occasionally we make mistakes, please forgive us for being human. Be courteous and let us know if you receive any letters from the government. We do correct returns for free, **if we are at fault.** However, **we are not responsible to pay any taxes owed.**

PLEASE REVIEW YOUR RETURN(S) CAREFULLY BEFORE SIGNING AND FILLING THEM. If you have any questions please call us. **THANK YOU** for allowing us to serve you this year! **WE GREATLY APPRECIATE YOUR BUSINESS!** This Engagement Letter will serve to apply to all future years unless the agreement is terminated or amended in writing by the taxpayer or preparer.

Tax Professional Credentials

Our Tax Service is not responsible for providing any of the deductions taken on my tax return(s). I have provided this information from my own records and I have proof of my deductions and income. I (we) have read the SERVICE DISCLOSURE AND PRIVATE POLICY attached to this letter.

Taxpayer

Date

Spouse

Date

NOTE: BOTH MUST SIGN THIS DOCUMENT, IF MARRIED FILING JOINT RETURN (Exception Surviving Spouse)

ATC TAX SERVICE DISCLOSURE

Protecting your privacy is fundamental to our business at **ATC TAX**. We honor all applicable privacy regulations, and we further strive to operate out business in a manner that justifies your choice of ATC TAX services. We are providing this privacy policy to you as required by law. This privacy policy explains the types of information we may collect from you, and informs you how we may disclose that information.

Who This Policy Covers:

This statement applies to information we collect when we provide financial products and services to customers and former customers of this ATC TAX office, an independently -owned business,

Information We Collect

We may collect information so that we may prepare your tax return. This information, referred to in this policy as "tax return information," includes, for example, your name, address and certain other data such as your social security number, income and deductions data, and other information about you and your dependents that we need to prepare your tax return.

We may collect information in connection with transactions beyond tax return preparation that you complete or propose to complete with us, our affiliates or others. This information may include, for example, your name, address and certain other "nonpublic personal information" such as checking, debit and credit account numbers, balances and payment history, income, assets, and social security number. "Tax return information" and "nonpublic personal information" may be collectively referred to as "personal information" in this policy.

We may collect personal information about your from IRS, our business, and non-affiliated third parties such as credit reporting agencies in connection with transactions you complete or propose to complete with us, our affiliates our non-affiliated third parties (e.g., personal information about your tax return, tax refund, refund anticipation loans or other loans.)

We, our affiliated or non-affiliated third parties with whom we have business relationships may collect information about you when you inquire about services or request information from us, submit rebate forms, or when you enter contest sponsored by us or third parties. This information may include, for example, your name, telephone number, mailing address and e-mail address.

How We May Disclose Your Information:

Our disclosure of your personal information is controlled by one or more of the following: Section 7216 of the Internal revenue Code; the Gramm Leach Bliley Act of 1999; certain other laws, and ATC TAX policies. We may disclose any of the categories of personal information that we collect (as described above) subject to the terms of this privacy policy.

Section 7216 of the Internal Revenue Code requires that we have your consent before we disclose your tax return information to affiliates or non-affiliated third parties except the Internal Revenue Service (IRS) and law enforcement officials, and excepts for other lawful purposes. Where this consent is required, we will not disclose your tax return information without your consent.

Information that is identical to specific elements of your tax return information such as name and address, may not be subject to Section 7216 if we also collect this information for purposes other than preparing your tax return, In these situations, we may disclose such information as described in this policy and required or permitted by law (but without regard to Section 7216)

We do not share your nonpublic information with non-affiliated third parties for marketing purposes except as permitted by the Gramm Leach Bliley Act or other applicable law, for do we sell or rent your personal information to third party direct markers.

X _____
Signature

PRIVACY POLICY

We may disclosure your personal information as described below when you have provided consent under section 7216 (Where required), or as otherwise permitted by applicable laws:

If you provided consent under Section 7216, we may disclose your tax return information to our affiliates engaged in banking, investment, credit loans, or home mortgages, insurance or other financial services activities in order to provide you with service enhancements and product opportunities that we believe may interest you.

We may disclose your personal information to service providers who perform business functions on our behalf. Services such organizations could perform on our behalf may include, for example, check printing, data processing and analysis, contest supervision, and direct mail or e-mail production. We require all service providers to have written contracts that specify appropriate use of your personal information, require them to safeguard your personal information, and prohibit them from making unauthorized or unlawful use of your personal information.

We may disclose your personal information to financial institutions with which we have joint marketing agreements. We require all joint marketers to have written contracts with us that specify appropriate use of your personal information, require them to safeguard your personal information, and prohibit them from making unauthorized or unlawful use or your personal information. If a state law (or other law) requires us to give you the right to opt-out prior to any disclosure personal information for such purposes without providing such opt-out or obtaining yours consent.

We may disclose your personal information to affiliates or non-affiliated third parties for other purposes permitted or required by law. Such purposes may include, for example, processing or fulfilling a service you request, or selling or transferring our business assets.

If you elect to obtain a refund anticipation loan, other loan products, a revolving line of credit to pay your tax liability, or if you elect to pay your tax preparation or electronic filing fees from your tax refund, you will be presented with a loan application and agreement and/or refund processing agreement. By accepting these agreements and signing the consent form presented to you, you are authorizing ATC TAX to disclose your personal information to the lending bank.

You should review all agreement and the privacy policies of the lending bank to understand how it may use and disclose your personal information.

How We Protect Your Information:

ATC TAX maintains policies and procedures requiring us to restrict access to your personal information in several ways. These include programs and specifications for physical security and records retention and disposal; computer and communication security measures reflected in systems design, password protection, and management practices; and other measures to restrict access to the data we hold in physical and electronic forms.

How You May Control Use of Your Information:

We may use personal information you provide (subject to your consent, where required) to communicate with you about products and services available through ATC TAX or non-affiliated third parties. If ay any time you wish to limit the offers or promotions you receive from us, you may call (281)374-6351. We will use reasonable efforts to comply with your request, although it may still be necessary for us to send you information form time to time about transactions or accounts you have with us, or our affiliates.

Date: _____