STAR Tax Solutions, LLC

Telephone: 949-272-6709
Fax: 949-480-1654
Address: 17880 Skypark Circle, Suite 125
Irvine, CA 92614
Website: www.startaxsolutions.com
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Dear Client:
Thank you for selecting me to assist you with your tax returns. This letter confirms the terms of my engagement with you and the nature and extent of services I will provide.

I will prepare your **2020** federal and all state income tax returns you request using information you provide to me. I may ask for clarification of some items, but I will not audit or otherwise verify the data you submit. I've enclosed an "Organizer" to help you gather the information required for a complete return. It will help you avoid overlooking important information and contribute to efficient preparation of your returns. That helps keep the cost of my services as low as possible.

In the interest of facilitating my services to you, I may communicate by facsimile transmission or send electronic mail over the internet. Such communications may include information that is confidential to you. While I will use my best efforts to keep such communications secure in accordance with my obligations under applicable laws and professional standards, you recognize and accept that I have no control over the unauthorized interception of these communications once they have been sent and consent to my use of these electronic devices during this engagement.

It is your responsibility to provide information required for preparation of complete and accurate returns. You should keep all documents, canceled checks, and other data that support your reported income and deductions. They may be necessary to prove accuracy and completeness of the returns to a taxing authority. You are responsible for the returns, so you should review them carefully before you sign them.

My work will not include any procedures to discover defalcations or other irregularities. The only accounting or analysis work I will do is that which is necessary for preparation of your income tax returns.

I must use my judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. In order to avoid penalties, I will apply the "more likely than not" reliance standard to resolve such issues. You agree to honor my decisions regarding the need to make protective disclosures in your returns.

The law also imposes penalties when taxpayers understate their tax liability. If you have concerns about such penalties, please call me. Your returns may be selected for audit by a taxing authority. Any proposed adjustments are subject to appeal. In the event of a tax examination, I can arrange to be available to represent you. Such representation will be a separate engagement for which an engagement letter will be provided to you. Fees and expenses for defending the returns will be invoiced in accordance with terms we agree on for that engagement.

My fee for preparation of your tax returns will be $_____. My fee is based on the amount of time required at standard billing rates plus out-of-pocket expenses. All invoices are due and payable upon presentation. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (30) days.

I will retain copies of records you supplied to me along with my work papers for your engagement for a period of seven years. After seven years, my work papers and engagement files will be destroyed. All of your original records will be returned to you at the end of this engagement. You should keep the original records in secure storage.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign on the last page of the tax organizer in the space indicated and send it to me via email or you may even fax it to me.

I appreciate your confidence in me. Please call if you have questions.

Sincerely,

Harshita Pujara

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- Please complete this questionnaire and mail, fax or email it to us.
- If you answer "yes" to any questions on Page 3, please include documentation to properly support and explain (e.g., W-2, K-1, 1098, 1099, list of educational expenses, home closing statement, etc.)
- Please enclose a copy of your prior year federal and state return.
- Please attach any additional documentation needed to fully prepare your federal and state tax returns

Personal Information

Your Last Name _____ First Name _____ MI _____ Date of Birth _____ Social Security Number _____

Occupation _____ Email Address _____ Contact Phone Number _____

Street Address _____

City _____ State _____ Zip _____

Are you a U. S. Citizen? ☐ Yes ☐ No
Are you legally blind? ☐ Yes ☐ No
Are you totally and permanently disabled? ☐ Yes ☐ No
Can anyone claim you or your spouse on their tax return? ☐ Yes ☐ No

Spouse's Information (if Applicable)

Your Last Name _____ First Name _____ MI _____ Date of Birth _____ Social Security Number _____

Occupation _____ Email Address _____ Contact Phone Number _____

Street Address _____

City _____ State _____ Zip _____

Are you a U. S. Citizen? ☐ Yes ☐ No
Are you legally blind? ☐ Yes ☐ No
Are you totally and permanently disabled? ☐ Yes ☐ No
Can anyone claim you or your spouse on their tax return? ☐ Yes ☐ No

Family and Dependent Information

As of December 31, 2020, your marital status was:

☐ Single
☐ Married: Did you live with your spouse during any part of the last six months of 2020? ☐ Yes ☐ No
☐ Divorced or Legally separated: Date of final decree or separate maintenance agreement: _____
☐ Widow/er: Date of spouse's death: _____

List the name of everyone below who lived in your home and outside your home that you supported during the year.

Full Name (do not include your or your spouse's name)	Date of Birth	Relationship (e.g. son, mother, sister)	Number of months lived in your home	U.S. citizen or Resident of U.S., Canada or Mexico? (yes/no)	Married as of 12/31/2020? (yes/no)	Full-time student? (yes/no)	Dependent's gross income?

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Life Events

☐Yes ☐ No If you are due a refund, would you like a direct deposit? _____ _____
Routing Number Account Number

☐Yes ☐ No If you have a balance due, would you like direct debit? _____ _____
Routing Number Account Number

During 2020, did you (or your spouse, if filing a joint return):

☐ Yes ☐ No Buy a home? If yes, closing date: _____
☐ Yes ☐ No Purchase and install energy efficient home items (such as windows, furnace, insulation, etc.)?
☐ Yes ☐ No Pay college tuition for yourself, your spouse, or any of your dependents?
☐ Yes ☐ No Have any student loans?
☐ Yes ☐ No Have health insurance for you, your spouse, and all dependents for the entire year?
☐ Yes ☐ No Have any bank accounts in foreign countries?
☐ Yes ☐ No Have balance/(s) greater than $10,000 in any foreign bank account/(s)?
☐ Yes ☐ No Make estimated tax payments or apply last year's refund to your 2020 tax? If yes, amount: _____

Income

During 2020 did you (or your spouse, if filing a joint return) receive:

☐ Yes ☐ No Wages or salary
☐ Yes ☐ No Tip income
☐ Yes ☐ No Interest/dividends (from checking or savings accounts, CDs, bonds, brokerage accounts, etc.)
☐ Yes ☐ No State tax refund. If yes, did you itemize deductions last year? ☐ Yes ☐ No
☐ Yes ☐ No Self-employment income (such as small business, contract labor, hobby, etc.)
☐ Yes ☐ No Alimony income
☐ Yes ☐ No Proceeds (or loss) from the sale of stocks, bonds, or real estate (including your home)
☐ Yes ☐ No Sell, send, exchange or otherwise acquire financial interest in any virtual currency
☐ Yes ☐ No Pensions, annuities, and/or IRA distributions
☐ Yes ☐ No Social security or railroad retirement benefits
☐ Yes ☐ No Income from rental property
☐ Yes ☐ No Economic Impact payment. If yes, amount? _____
☐ Yes ☐ No Other income: (gambling, jury duty, lottery, prizes, awards, etc.). Identify: _____

Expenses

During 2020 did you (or your spouse, if filing a joint return) pay:

☐ Yes ☐ No Alimony: If yes, what is the recipient's SSN? _____
☐ Yes ☐ No Contributions to IRA, 401(k), or other retirement accounts, including employer retirement account
☐ Yes ☐ No Rent for your personal residence?
☐ Yes ☐ No Medical expenses
☐ Yes ☐ No Home mortgage interest
☐ Yes ☐ No Real estate taxes for your home
☐ Yes ☐ No Car/Motorcycle License registration fees? If yes, amount? _____
☐ Yes ☐ No Charitable contributions
☐ Yes ☐ No Child/dependent care expenses that allowed you and your spouse to work or to look for work

. I have examined this tax organizer and accompanying documentation, and to the best of my knowledge and belief, they are true, correct and complete. I have included all the documentation necessary to prepare a true and complete federal, state and local tax return. I agree to all terms of the engagement letter included with this organizer

_____ _____
Your signature Date

_____ _____
Spouse signature Date

Both husband and wife must sign for preparation of joint returns.