



Morgey Accounting, LLC

Clearing your path to profit

Karen J Morgey, CPA
Certified QuickBooks ProAdvisor

1305 N Black Horse Pike
Blackwood, NJ 08012
kjorgey@comcast.net
(856) 435-0070
morgeycpa.com

2021 TAX SERVICE WORKSHEET & AGREEMENT

Welcome to your tax adventure

Contact Name(s): _____

Phone: _____ - _____ - _____ e-mail: _____

Direct Deposit or ACH Payment: checking savings no thank you

Use for refunds yes* no Use for payments yes* date to pay __/__/__ no

*Be sure to complete the bank information on your organizer

How would you like your return delivered: PDF mailed notify for pick up

Please return:

Copy of your 2020 tax return

This worksheet

Completed Questionnaire & Organizer

All **IMPORTANT TAX DOCUMENTS**** received

- ◆ W-2 (wages, gambling winnings)
- ◆ 1095 (health insurance info)
- ◆ 1098 (mortgage, student loan or tuition payments)
- ◆ 1099 (other income like interest, subcontract pay, or sales proceeds)
- ◆ K-1 (income from owning a business)
- ◆ Any letters received from the IRS

*Thank you for taking the time
to complete your paperwork.
Return this page along with all
requested information for
\$20 off your tax return.*

Note: Missing **IMPORTANT TAX DOCUMENTS will likely result in a tax notice and additional billable work.

 I/We accept the terms as explained on the enclosed 2021 Tax Service Agreement

Taxpayer Signature: _____ date: __/__/__

Spouse Signature (required for joint return): _____ date: __/__/__

Questions or Notes: _____

Please upload your information to my portal at <https://morgeycpa.securefilepro.com/portal/#/login>

I'm looking forward to working with you



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January 2022

2021 Tax Service Agreement

Thank you for choosing Morgey Accounting, LLC to assist you with your 2021 taxes. This letter confirms the terms of my engagement with you and outlines the nature and extent of the services I will provide.

I will prepare your 2021 federal and state income tax returns. I will depend on you to provide the information I need to prepare complete and accurate returns. I may ask you to clarify some items but will not audit or otherwise verify the data you submit. An Organizer is available to help you collect the data required for your return. The Organizer will help you avoid overlooking important information. By using it, you will contribute to the efficient preparation of your returns and help minimize the cost of my services.

I will perform accounting services only as needed to prepare your tax returns. My work will not include procedures to find defalcations or other irregularities. Accordingly, my engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. I will inform you of any material errors, fraud, or other illegal acts I discover.

The law imposes penalties when taxpayers underestimate their tax liability. Call us if you have concerns about such penalties.

Should I encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, I will outline the reasonable courses of action and the risks and consequences of each. I will ultimately adopt, on your behalf, the alternative you select.

I will return your original records to you at the end of this engagement. Store these records, along with all supporting documents, in a secure location. I retain copies of your records and my work papers from your engagement for up to seven years, after which these documents will be destroyed.

If you have not selected to e-file your returns with my office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them. My engagement to prepare your 2021 tax returns will conclude with the delivery of the completed returns to you, or with e-filed returns, with your signature and my subsequent submittal of your tax return.

My fee for the services outlined above is based upon the complexity of the work to be performed, and my professional time, as well as out-of-pocket expenses. In addition, this fee depends upon the timely delivery, availability, quality, and completeness of the information you provide to us.

For your records

You agree that you will deliver all records requested to complete this engagement on a timely basis. Payment is due when you receive your copy of the return.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, sign the enclosed tax service worksheet in the space indicated and return it to me with your tax documents.

Thank you for the opportunity to be of service. If you have any questions, contact my office at (856) 435-0070 or kjmorgey@comcast.net.

Sincerely,



Karen J Morgey, CPA
Morgey Accounting, LLC

Privacy Policy

Your privacy is important to me. I collect nonpublic personal information about you from various sources, including:

- * Interviews regarding your tax situation
- * Applications, organizers, or other documents that supply such information as your name, address, telephone number, Social Security Number, number of dependents, income, and other tax-related data
- * Tax-related documents you provide that are required for processing tax returns, such as Forms W-2, 1099R, 1099-INT and 1099-DIV, and stock transactions

I do not disclose any nonpublic personal information about my clients or former clients to anyone, except as requested by my clients or as required by law.

I restrict access to personal information concerning you, except to my employees who need such information in order to provide products or services to you. I maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your personal information.