3030 E Market St | York, PA 17402
Call or text: 717-759-4227
We'll count the beans... You enjoy the coffee!

Business Tax Info Sheet

Returns are delivered digitally through SmartVault. Check for a hard copy: ☐

OWNER

Name

Address

Phone Email

DOB Social Security #

Spouse's Name

Spouse's DOB Spouse's Social Security #

If Corp or Multi-Member LLC, please list other officer names:

DOB: Soc Sec #:

DOB: Soc Sec #:

DOB: Soc Sec #:

DOB: Soc Sec #:

BUSINESS

Name

Address

Phone

Email

Entity ☐ Sole prop ☐ LLC ☐ S-corp ☐ C-corp ☐ Nonprofit EIN Industry

Payroll? PA # PAUC # EIT/LST #

Bank Name

Routing # Account #

If you are an LLC, have you filed for an S-Corp election? ☐ Yes ☐ No ☐ Unsure

What does the business do?

Do you have a myPATH account? ☐ Yes ☐ No

Username: Password:

Notes:

Required: EIN letter, business filing documents, and copy of driver's license.

Return this form securely through SmartVault; do not send passwords by email.

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BUSINESS TAX PREPARATION ENGAGEMENT

Parties and covered returns

This agreement is between Accounting Services of York, LLC (ASY) and the business named below. It covers only the business tax returns and tax years identified here and additional work ASY accepts in writing. The person signing represents that they are authorized to bind the business.

Legal business name _____

Tax year(s) _____

Federal return(s), e.g., 1065 or 1120-S _____

State / local returns and jurisdictions _____

1 | Scope of services

ASY will prepare the specified business income tax returns and related entity schedules, including K-1s when applicable, based on information the business provides. The business is responsible for providing K-1s and other required information to owners. Specify any agreed additional returns or services in writing.

Separate services

Owners' individual returns, bookkeeping and reconciliation, payroll, sales tax, registrations, annual reports, tax planning, estimated-payment monitoring, amended or prior-year returns, notices, audits and representation are separate services unless ASY accepts them in writing. A power of attorney alone does not engage ASY for additional work. Foreign returns are excluded; U.S. international information filings are included only if specifically identified and accepted in writing.

2 | Records and responsibilities

Provide complete, accurate, organized records, prior returns and requested schedules; income and expense totals categorized by type, a clean income statement (P&L), or the ASY Small Business Spreadsheet; balance sheet, bank and loan records; asset purchases, sales and depreciation details; payroll information; ownership percentages and changes; contributions, distributions and loans; and any elections or other documents affecting the return. Maintain supporting documentation and respond promptly to ASY questions.

Spreadsheet download

Download the ASY Small Business Spreadsheet at accountingservicesofyork.com/downloads/.

Basis and ownership

The business must identify all owners and provide accurate ownership and transaction records. Owner-level stock, debt, partnership or other basis calculations require supporting records and are included only if specifically agreed. The business must promptly report changes, corrected information, foreign activities and other facts affecting filings.

No audit or assurance

ASY may rely on information supplied without auditing it, but will make inquiries when required or when information appears incomplete, inconsistent or incorrect. This engagement is not an audit, review or other assurance engagement and does not include detecting fraud or all errors. ASY may decline an unsupported position or withdraw if concerns cannot be resolved.

3 | Deadlines and extensions

ASY will not begin preparing the return until all required documents and information have been provided. Work received within three weeks (21 calendar days) of the applicable original filing deadline is not guaranteed by that deadline. For accepted engagements, ASY will file an available applicable extension when needed if the signed agreement, necessary information and any required authorization are received in time. ASY will provide confirmation if requested. An extension generally extends the time to file, not to pay; taxes and estimated payments remain the business's responsibility.

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4 | Filing and delivery

The business must review the completed returns, K-1s and payment instructions, notify ASY of errors, sign required e-file authorizations and pay the invoice before filing. Signing this agreement does not replace a filing authorization. ASY will identify electronic filings and any returns the business must sign and mail. ASY does not electronically file local earned income tax returns; when such a return is included, the client is responsible for mailing it. Electronic submission is not proof of acceptance; cooperate promptly to resolve rejections.

Copies and security

Completed returns are delivered through SmartVault unless a hard copy is requested. Send sensitive records through SmartVault or another ASY-approved secure method, or deliver them to the office. Retain your own supporting records, basis and carryover schedules and proof of filing and payment.

5 | Fees, payment and notices

Tax preparation fees depend on the work and forms required. Receipt totaling, reconciliation and other cleanup are billed separately at $150 per hour. Amendments start at $250; corrections arising from ASY errors are evaluated separately. The new-client retainer is $100 per tax year, nonrefundable and applied to the related invoice, except where a refund is required by law. Payment is due on completion and before filing. Completed returns unpaid 30 days after notice that they are ready will be sent to collections.

Taxes, penalties and notices

The business is responsible for its taxes and timely payments. Responsibility for penalties, interest or corrections depends on the circumstances and applicable obligations; ASY does not disclaim its own duties. Send all pages of agency notices promptly. Notice response and representation require separate acceptance.

6 | Confidentiality and completion

ASY safeguards information and uses service providers as permitted by law. Any legally required separate consent for use or disclosure of tax return information will be obtained separately. Either party may end the engagement by written notice; ASY will communicate outstanding work and known deadlines, and provide client records as required. Fees for work performed remain due. The engagement ends upon accepted electronic filing and communication of remaining tasks, or delivery and instructions for returns the client must file. Unfinished work or rejections will be addressed in writing. No ongoing monitoring or future-year services are implied.

Acceptance

By signing, the authorized representative accepts the terms and authorizes the services and available extensions described above. Any change in scope requires ASY’s written acceptance.

Authorized representative signature _____

Printed name _____

Title / authority _____

Date _____

ASY representative / acceptance _____

Date _____