

# I.E.D Tax Services

Nechie Newberry ERQ / Notary I.E.D Tax and Financial Services 3435 Monroe, Kansas City, Missouri 64123 (816)924-4119

## Interview Information

Taxpayer Name: \_\_\_\_\_ Spouse Name: \_\_\_\_\_  
 Taxpayer SSN: \_\_\_\_\_ Spouse SSN: \_\_\_\_\_  
 Taxpayer Date of Birth: \_\_\_\_\_ Spouse Date of Birth: \_\_\_\_\_  
 Taxpayer Email: \_\_\_\_\_ Spouse Email: \_\_\_\_\_  
 Mailing Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_ Zip Code \_\_\_\_\_  
 Day Time Phone: \_\_\_\_\_ Evening Phone: \_\_\_\_\_

Can you be claimed on another person's tax return?      YES                      NO

Filing Status:      Single              Married Filing Joint      Married Filing Separate      Head of Household

Dependent Name	SSN	Date of Birth	Relationship	# Months In Home

How many dependents are under Age 17? \_\_\_\_\_

Child care provider \_\_\_\_\_ SSN or EIN \_\_\_\_\_ Amount \_\_\_\_\_ #Children \_\_\_\_\_

How many of your dependents are qualified for Earned Income Credit? \_\_\_\_\_

Did you receive any Advance Earned Income Credit this year?      YES              NO

Did you have any 1099's or other income?      YES      NO      Did you itemize last year?      YES      NO

How many W2's do you have? \_\_\_\_\_

Do you wish to have your State Taxes prepared and electronically filed (No extra Charge)      YES      NO

Do you give your preparer permissions to your discuss your return with the IRS?      YES      NO

### Please be prepared to show to forms of I.D.

Picture I.D. #1 Type:	Expiration:
Picture I.D. #2 Type:	Expiration:

*I certify that the information I have supplied in this form is true and correct. I understand that this information is private and will not be used for any other purpose than to complete my tax return.*

Taxpayer Signature: \_\_\_\_\_ Date: \_\_\_\_\_

ERQ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## **General Engagement Letter for Individual Tax Return Preparation**

This letter is to inform you, the taxpayer, of the services we will provide you, and the responsibilities you have for preparation of your tax return.

### ***Tax Return Preparation***

- We will prepare your 2015 federal and state tax returns based on information you provide. Services for preparation of your return do not include auditing or verification of information provided by you.
- This engagement does not include any audit or examination of your books or records. In the event your return is audited, you will be responsible for verifying the items reported.
- The tax return preparation fee does not include bookkeeping.
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
- Preparation fees do cover limited assistance and consultation during the year.
- The engagement to prepare your 2015 tax returns terminates upon delivery of your completed returns and original documents to you. Please store your supporting documents and copies of your tax returns in a secure place for at least seven years.

### ***Taxpayer Responsibilities***

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the return carefully before signing to make sure the information is correct.
- Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required for preparation of late returns.

**Signatures.** By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities and that you understand our responsibilities in preparing your tax returns as explained above. For a joint return, both taxpayers must sign.

- You should keep a copy of your tax return and any related tax documents. You may be assessed a fee if you request a copy in the future.

---

Taxpayer

Spouse

Date

**Privacy Policy.** The nature of our work requires us to collect certain nonpublic personal information about you from various sources. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to any third party without your express permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access. Please contact us with any questions regarding our privacy policy.

I.E.D. Tax and Financial Services  
Nechie DeBerry: President/ERO/Notary  
Phone/Fax: (816) 924-4119  
Email: [iedtax@earthlink.net](mailto:iedtax@earthlink.net)

As our client your privacy is important to us; therefore we have adopted the following Privacy Policy. We collect non-public personal information about you from various sources, including the following:

Information we receive from interviews regarding your tax situation

Information we receive an applications, organizations, or by other mean, such as your name, address, telephone number, social security number, dependents, income, and other tax-related data

Information from tax-related documents your provide that are required to process tax returns, such as Forms W-2, 1099R, 1099-NT, and 1099-DIV and stock transaction, etc.

We do not disclose any non-public information about our customers or former customers to anyone, except if requested by our customer or if required by law

We restrict access to non-public personal information concerning your, except to employees who need access to such information in order to provide products or service you. We may maintain physical, electronic and procedural safeguards that comply with federal regulations to guard your non-public personal information.

If you have any questions about our Privacy Policy, please contact us.

Sincerely, \_\_\_\_\_

# CONSENT TO DISCLOSURE OF TAX RETURN INFORMATION

For the purpose of completing this consent form,

\_\_\_\_\_ shall be referred to as (“we,” “us,” and “our”)  
(Printed name of Tax preparer)

Federal law requires this consent form be provided to you (“you” refers to each taxpayer, if more than one). Unless authorized by law, we cannot disclose, without your consent, your tax return information to third parties for purposes other than the preparation and filing of your tax return. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year.

You have indicated you are interested in receiving an EPA Refund Deposit Account Check, Direct Deposit, or the E1 Visa Prepaid Card collectively, through use of the an EPA Refund Deposit Account “RDA”) provided through EPS Financial, a division of MetaBank (“EPA”), Visa U.S.A. INC., (“Visa”), First Century Bank, N.A. (“FCB”), and 1<sup>st</sup> Money Center, Inc (“1MC”). In order to have your RDA product request evaluated and processed, we, along with EPS, must disclosure all your 2016 tax return information necessary for evaluating the request to Visa, FCB, and 1MC. If you request a more limited disclosure of tax return information, you will not be eligible to submit application request for an RDA disclosure of tax return information, you will not be eligible to submit application request for an RDA disclosure of tax return information, you will not be eligible to submit application request for an RDA product. If you would like us to disclose your 2016 tax return information for this purpose, please complete this consent to the disclosure of your tax return information.

By signing below, you authorize us to disclose to EPS, Visa, FCB, and 1MC all of your 2016 tax return information necessary for the evaluation and processing of your request for an RDA product. You understand that if you are unwilling to authorize the disclosure and sharing of your tax return information with EPA, Visa, FCB, and 1MC you will not be able to obtain an RDA product, but you may still choose to have your tax return prepared and filed by us for a fee.

Printed name of taxpayer: \_\_\_\_\_

Taxpayer signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name of joint taxpayer: \_\_\_\_\_

Joint taxpayer signature: \_\_\_\_\_ Date: \_\_\_\_\_

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by e-mail at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).



## General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form 8879 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/Form8879](http://www.irs.gov/Form8879).

### Purpose of Form

Form 8879 is the declaration document and signature authorization for an e-filed return filed by an electronic return originator (ERO). Complete Form 8879 when the Practitioner PIN method is used or when the taxpayer authorizes the ERO to enter or generate the taxpayer's personal identification number (PIN) on his or her e-filed individual income tax return.



*Don't send this form to the IRS. The ERO must retain Form 8879.*

### When and How To Complete

Use this chart to determine when and how to complete Form 8879.

IF the ERO is . . .	THEN . . .
Not using the Practitioner PIN method and the taxpayer enters his or her own PIN	Don't complete Form 8879.
Not using the Practitioner PIN method and is authorized to enter or generate the taxpayer's PIN	Complete Form 8879, Parts I and II.
Using the Practitioner PIN method and is authorized to enter or generate the taxpayer's PIN	Complete Form 8879, Parts I, II, and III.
Using the Practitioner PIN method and the taxpayer enters his or her own PIN	Complete Form 8879, Parts I, II, and III.

### ERO Responsibilities

The ERO must:

1. Enter the name(s) and social security number(s) of the taxpayer(s) at the top of the form.
2. Complete Part I using the amounts (zeros may be entered when appropriate) from the taxpayer's 2019 tax return. Form 1040-SS filers leave lines 1 through 3 and line 5 blank.
3. Enter or generate, if authorized by the taxpayer, the taxpayer's PIN and enter it in the boxes provided in Part II.

4. Enter on the authorization line in Part II the ERO firm name (not the name of the individual preparing the return) if the ERO is authorized to enter the taxpayer's PIN.

5. Provide the taxpayer(s) Form 8879 by hand delivery, U.S. mail, private delivery service, email, Internet website, or fax.

6. Enter the 20-digit Submission Identification Number (SID) assigned to the tax return, or associate Form 9325, Acknowledgement and General Information for Taxpayers Who File Returns Electronically, with Form 8879 after filing. If Form 9325 is used to provide the SID, it isn't required to be physically attached to Form 8879. However, it must be kept in accordance with published retention requirements for Form 8879. See Pub. 4164, Modernized e-File (MeF) Guide for Software Developers and Transmitters, for more details.



*You must receive the completed and signed Form 8879 from the taxpayer before the electronic return is transmitted (or released for transmission).*

For additional information, see Pub. 1345.

### Taxpayer Responsibilities

Taxpayers must:

1. Verify the accuracy of the prepared income tax return, including direct deposit information.
  2. Check the appropriate box in Part II to authorize the ERO to enter or generate your PIN or to do it yourself.
  3. Indicate or verify your PIN when authorizing the ERO to enter or generate it (the PIN must be five digits other than all zeros).
  4. Sign and date Form 8879. Taxpayers must sign Form 8879 by handwritten signature, or electronic signature if supported by computer software.
  5. Return the completed Form 8879 to the ERO by hand delivery, U.S. mail, private delivery service, email, Internet website, or fax.
- Your return won't be transmitted to the IRS until the ERO receives your signed Form 8879.

**Refund information.** You can check on the status of your 2019 refund if it has been at least 72 hours since the IRS acknowledged receipt of your e-filed return. But if you filed Form 8379 with your return, allow 11 weeks. To check the status of your 2019 refund, do one of the following.

- Go to [www.irs.gov/Refunds](http://www.irs.gov/Refunds).
- Call 1-800-829-4477 for automated refund information and follow the recorded instructions.
- Call 1-800-829-1954.

### Important Notes for EROs

- Don't send Form 8879 to the IRS unless requested to do so. Retain the completed Form 8879 for 3 years from the return due date or IRS received date, whichever is later. Form 8879 may be retained electronically in accordance with the recordkeeping guidelines in Rev. Proc. 97-22, which is on page 9 of Internal Revenue Bulletin 1997-13 at [www.irs.gov/pub/irs-irbs/irb97-13.pdf](http://www.irs.gov/pub/irs-irbs/irb97-13.pdf).
- Confirm the identity of the taxpayer(s).
- Complete Part III only if you are filing the return using the Practitioner PIN method. You aren't required to enter the taxpayer's date of birth, prior year adjusted gross income, or PIN in the Authentication Record of the electronically filed return.
- If you aren't using the Practitioner PIN method, enter the taxpayer(s) date of birth and either the adjusted gross income or the PIN, or both, from the taxpayer's prior year originally filed return in the Authentication Record of the taxpayer's electronically filed return. **Don't** use an amount from an amended return or a math error correction made by the IRS.
- Enter the taxpayer's PIN(s) on the input screen only if the taxpayer has authorized you to do so. If married filing jointly, it is acceptable for one spouse to authorize you to enter his or her PIN, and for the other spouse to enter his or her own PIN. It isn't acceptable for a taxpayer to select or enter the PIN of an absent spouse.
- Taxpayers must use a PIN to sign their e-filed individual income tax return transmitted by an ERO.
- Provide the taxpayer with a copy of the signed Form 8879 for his or her records upon request.
- Provide the taxpayer with a corrected copy of Form 8879 if changes are made to the return (for example, based on taxpayer review).
- EROs can sign the form using a rubber stamp, mechanical device (such as a signature pen), or computer software program. See Notice 2007-79, 2007-42 I.R.B. 809, available at [www.irs.gov/irb/2007-42\\_IRB/ar10.html](http://www.irs.gov/irb/2007-42_IRB/ar10.html) for more information.
- Go to [www.irs.gov/efile](http://www.irs.gov/efile) for the latest information.