

# Famiglio & Associates

A Professional Accountancy, Tax, & Financial Group

George V. Famiglio, Jr. CPA, PFS, CFP, CFS  
Masters Degree in Taxation

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Dear Client,

We appreciate the opportunity to work with, and advise you regarding your taxation. The Internal Revenue Service imposes penalties upon taxpayers, and upon us as preparers, for failure to observe due care in reporting income tax returns. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom we prepare tax returns to **confirm the following arrangements by signing the back of this engagement letter**. We will prepare your Federal, and requested State income tax returns, from information that you will furnish to us with your client organizer. We will make no audit or other verification of the data you submit, although we may need to ask you for clarification of some of the information. We will provide you with questionnaires and/or worksheets to guide you in gathering the necessary information. Your use of such forms will assist us in keeping our fee to a minimum.

*It is your responsibility to provide us with all the information required for the preparation of complete and accurate returns. You represent to us that your records, as required by law, support your expenses for meals, entertainment, travel, gifts, and vehicle use. You should retain all the documents, canceled checks, and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns, and therefore, you should review them carefully before you sign them.*

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations or other irregularities, should any exist.

*We will use our 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. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.*

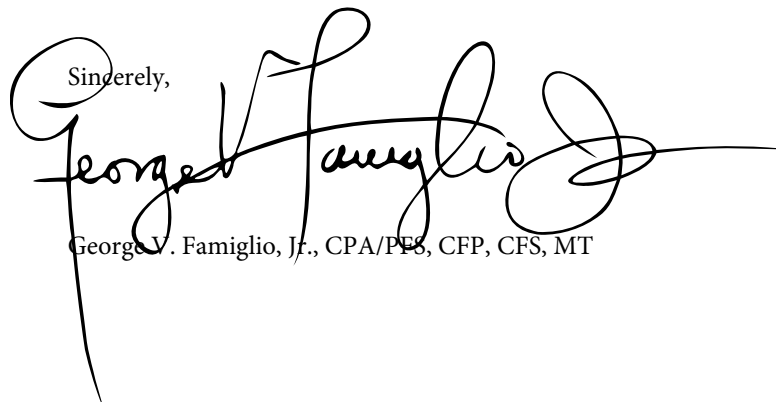
The law provides various penalties that may be imposed when taxpayers understate their tax liability. If you would like information on the amount or circumstances of these penalties, please contact us.

Your returns may be selected for review by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such government tax examination, we will be available upon request to represent you and will render additional invoices for the time and expenses incurred.

Our fee for these services will be based upon the amount of time required at our standard billing rate, plus out-of-pocket expenses. **All invoices are due at time of tax return completion.** Failure to pay would allow us to terminate this agreement.

We want to express our appreciation for this opportunity to work with you.

Sincerely,

A large, stylized handwritten signature in black ink that reads "George V. Famiglio, Jr." The signature is written in a cursive, flowing style with a long horizontal line extending to the right.

George V. Famiglio, Jr., CPA/PFS, CFP, CFS, MT

## We Will Prepare:

Federal Income Tax Returns  
*The IRS has implemented a mandate requiring our firm to electronically file the returns we prepare. We may file extensions as needed for all types of returns.*

State Income Tax Returns  
*If applicable.*

Local Income Tax Returns  
*Please Note: You must enclose any forms needed.*

Personal Property/Intangible

City/Township

## Circle One:

*Yes / No?* Will you be contributing to an IRA, SEP, Keough, Pension, or Profit Sharing Plan before April 15<sup>th</sup> 2013? *If you will be contributing to an IRA, please send a schedule of all IRA investments to date showing the name of investment and value as of December 31<sup>st</sup>. Husbands and Wives have separate schedules.*

*Yes / No?* Do you have **any** sort of foreign financial account or asset? *Please Note: The U.S. Treasury has increased enforcement & compliance on foreign bank and investment accounts. Failure to file and disclose timely can subject you to penalties in excess of \$10,000.00 — All types of accounts, investments, and other assets, must be disclosed.*

## Do You Need Assistance in Any of the Following Areas?

- |     |                          |    |                          |   |
|-----|--------------------------|----|--------------------------|---|
| YES | <input type="checkbox"/> | NO | <input type="checkbox"/> | Analyzing your estate.  |
| YES | <input type="checkbox"/> | NO | <input type="checkbox"/> | Reducing your tax liability.  |
| YES | <input type="checkbox"/> | NO | <input type="checkbox"/> | Stimulus Package Incentives.  |
| YES | <input type="checkbox"/> | NO | <input type="checkbox"/> | Ponzi Losses or Foreclosure Issues.   |
| YES | <input type="checkbox"/> | NO | <input type="checkbox"/> | Planning, Restructuring, or Selling a Business.   |
| YES | <input type="checkbox"/> | NO | <input type="checkbox"/> | Obtaining financial independence by age _____.  |
| YES | <input type="checkbox"/> | NO | <input type="checkbox"/> | Planning an educational fund for your children.   |
| YES | <input type="checkbox"/> | NO | <input type="checkbox"/> | Reducing taxes on your Social Security benefits.  |
| YES | <input type="checkbox"/> | NO | <input type="checkbox"/> | Increasing the return on your investments.  |
| YES | <input type="checkbox"/> | NO | <input type="checkbox"/> | Establishing/Funding an IRA, SEP, Keough, or Roth IRA.  |
| YES | <input type="checkbox"/> | NO | <input type="checkbox"/> | Establishing a systematic savings program for _____.<br><i>e.g., home, vacation, retirement</i> |

**Taxpayer:** \_\_\_\_\_ *Please Sign & Print* **Date:** \_\_\_\_\_

**Spouse:** \_\_\_\_\_ *Please Sign & Print* **Date:** \_\_\_\_\_

**THIS FORM MUST BE SIGNED & RETURNED WITH  
CLIENT ORGANIZER**