

# Lacy Italiano, EA

7317 El Cajon Blvd Ste 101

La Mesa, CA 91941

(619) 300-0972

Lacy@LacyItaliano.com

January 6, 2021

Dear New Client

As 2020 ends and the new year begins, it's time to start thinking about taxes again. 2020 has been a trying year for all of us. I hope this letter finds you healthy and safe. As the Coronavirus (COVID-19) emergency continues to grow, I have had to make some changes in my practices and procedures. For the health and safety of all, I will **NOT** be holding any in-person meetings. All tax appointments will be held via telephone or Zoom.

Enclosed is a annual Client Engagement letter and 2020 Tax Organizer which I will use in preparing your 2020 tax return(s). As you receive your 2020 tax documents, please collect them and keep them with this organizer. Most common tax documents are including but not limited to the following:

- Form(s) W-2 (wages, etc.)
- Form(s) 1099 (interest, dividends, etc.)
- Schedule(s) K-1 (income/loss from partnerships, S corporations, etc.)
- Form(s) 1098 (mortgage interest) and property tax statements
- Brokerage statements from stock, bond or other investment transactions
- Closing statements pertaining to real estate transactions
- Form(s) 1099-K (Merchant Card and Third Party Network Payments)
- Business Profit & Loss or worksheet (available on my website)
- Rental Profit & Loss or worksheet (available on my website)
- All other supporting documents (schedules, checkbooks, etc.)
- Any tax notices received from the IRS or other taxing authorities
- Copy of last year's tax return. If you have the past three years, please provide all.

When you have gathered all (or almost all) your tax information you may **mail, drop off or upload electronically to my secure client portal** your completed tax organizer with signed engagement letter, along with your various tax forms.

Mail and drop off location will be:

**7317 El Cajon Blvd. Ste 101 La Mesa, CA 91942**

If you would like to use my secure client portal to complete your 2020 tax return(s) and have not yet been set up, please contact me.

Your patience and understanding are greatly appreciated as I continue to pivot and adjust during these difficult times. As always, it is my pleasure to provide you with personalized, accurate and affordable tax preparation. If you have any questions or concerns, please do not hesitate to reach out.

Sincerely,

Lacy Italiano, EA

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## ENGAGEMENT AGREEMENT & PRIVACY POLICY

Dear New Client

This letter is to confirm our understanding of the terms of our agreement and outline the nature and extent of services we will provide. Based upon the information you furnish to me, I will prepare your federal and applicable state income tax returns for 2020.

I will not audit or verify the data you submit to me, although I may ask for clarification when necessary. All the information you submit to me will, to the best of your knowledge, be correct and complete and include all other information necessary for the completion of your tax return.

I will also prepare estimated tax vouchers if required, based on your income or withholding taxes for 2021. If you anticipate a substantial change in income or withholding please advise me as soon as possible. I will then determine whether an adjustment should be made to your tax estimates.

Your returns are subject to review by the taxing authorities. Any items that may be resolved against you by the examining agent are subject to certain rights of appeal. In the event of an examination, I will be available upon request to represent you, or to review the results of any examination. Billing for these additional services will be at my standard rates.

**You, as the taxpayer, have the final burden of responsibility for your income tax returns. Please review them carefully for any errors or omissions before you sign and file them.**

**Privacy Policy, Compliance with the Gramm-Leach-Bliley Act, Public Law  
106-102 (FTC 16 CFR Part 313)**

The privacy of your client information has always been important to me, and I have always been bound by professional standards of confidentiality. However, I am required by law to formally inform you of our privacy policy.

I collect nonpublic personal information about you that is provided by you or obtained by me with your authorization. This information may come from various sources, including information I receive from personal interviews, tax organizers, worksheets and other documents necessary to provide professional services to you.

I do not disclose any nonpublic personal information about my clients or former clients to anyone, except as permitted or required by law, or when necessary to process transactions requested by a client.

I restrict access to nonpublic personal information about you to members of my firm who need to know that information in order to provide you professional services. I retain records relating to the professional services that I provide you in accordance with accounting and government standards.

I employ physical, electronic, and procedural security safeguards to protect your nonpublic personal information.

Your confidence and trust are important to me. If you have any questions or concerns regarding the privacy of your nonpublic personal information, please contact me.

By signing this, I affirm that I have read, understand and accept the terms of the engagement and privacy policy as detailed above:

Sincerely,

Lacy Italiano, EA

Accepted by:

\_\_\_\_\_  
Client #1 signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Client #2 signature

\_\_\_\_\_  
Date