THOMSON
ACCOUNTANTS INC

Corporate (1120,1120S) & Partnership (1065) Annual Organizer – Tax Year 2025

☐ Check Box if this is the first year TAI is preparing your Corporate or Partnership tax return:
Include prior year's tax return with Depreciation Schedules.

Company Information:

Business Name: ______________________________

Company Address: Street: ______________________________

City: ____________________ State: ________ Zip: ____________

Employer Identification # (EIN): ______________________

Date of Incorporation: ________/________/__________

Business Phone: (________)________-____________

Email(s): ______________________________

Officer, LLC Member, Or Partner to Sign the Tax Return:

Full Name: ______________________________ **Title:** ______________________

Social Security Number: ______________________ **Phone:** (________)________-____________

Any payments over $600 to Subcontractors for rent which require you to file Form 1099? ☐ **YES** ☐ **NO**

If **YES**, did you or will you file all required forms 1099/1096? ☐ **YES** ☐ **NO**

Did all C-Corp or S-Corp officers receive the required W-2 wages for their compensation? ☐ **YES** ☐ **NO**

If employee W-2 wages were paid, did you or your payroll processor file required Federal and State employment forms? ☐ **YES** ☐ **NO**

Profit and Loss/Financials will be provided by:
☐ **QuickBooks / Accounting Reports**
☐ **QuickBooks Online Access**
☐ **Business Worksheet**

Company Contributions to SEP / 401 Plans / Retirement Plans: *Provide additional contributions on a separate sheet.*

Employee / Officer Name: ______________________________ **Amount: $**______________

Employee / Officer Name: ______________________________ **Amount: $**______________

List any changes to existing partner or shareholder ownership, percentages, and dates:

____

List any officer or partner distributions/dividends paid this tax year - **Names and $ Amounts:**

____

List any cash or property contributions to the business this tax year by officers - **Names and $ Amounts:**

____

Shareholder Information: *Provide the current mailing address for any shareholder who will receive a K-1.*

Name: ____

Street: ____

City: ______________________ State: ________ Zip: __________

Name: ____

Street: ____

City: ______________________ State: ________ Zip: __________

Name: ____

Street: ____

City: ______________________ State: ________ Zip: __________

Name: ____

Street: ____

City: ______________________ State: ________ Zip: __________

Receiving Your Tax Return:

☐ ☐

Select how you would like to receive your tax return copy: *(Check at least one)*

- ☐ **PORTAL -** PDF File *(No Fee)*
  - ☐ I will collect my tax documents from the office by **November 1, 2025** or they will be securely shredded.
  - ☐ Mail back my tax documents *($10)*
- ☐ **OFFICE -** Pick up a paper copy of my tax return *($10)*
- ☐ **MAIL** - Mail a paper copy of my tax return *($15)*

Payment Authorization Form

*Choose **ONE** option below to authorize payment for your Baer Tax Group services.

(This is NOT for payment of any taxes due.)

Clients must supply this form annually to verify their payment method or upon initiation of any service.

OPTION 1:** Checking/Savings account for electronic debit ***(No Fee)

Name of Financial Institution: ____

Name on Account : ____

Account Type: ☐ **Checking** ☐ **Savings**

Routing Number: ____

Account Number: ____

Client Phone Number: (_______)_________-_______________

OPTION 2:** Credit Card ***(3.5% convenience fee) *Visa and MasterCard only

Card Type: ☐ **Visa** ☐ **MasterCard**

Name on Credit Card: ____

Credit Card Number: ____

Expiration Date: ______/______ **CVC (3 digits):** _______ **Billing Zip Code:**______________

I/We hereby authorize Thomson Accountants, Inc. to initiate debit entries to our account at the financial institution provided above for the purpose of paying our fees for accounting and/or tax work.

An invoice will be issued upon completion of work for our provided services. The debit will be processed on the invoice due date. If the due date falls on a weekend or holiday, it will be processed the next business day.

I/We understand that if the funds are not available in the above account at the time of debit, TAI will send notification that the transaction could not be completed. TAI will charge for fees due to insufficient funds or other reasons of unaccepted payment.

Further, I/we agree not to hold TAI responsible for any delay or loss of funds due to incorrect or incomplete information supplied by me or by my financial institution.

This agreement will remain in effect until TAI receives written notification of cancellation from me/us at the following email address **office@thomsonaccounting.com**. The notice of cancellation must be received in such time and manner as to allow required time for processing.

Print Name: ____

Signed:____ **Date:** __________________

Policies

Our Process

Tax return preparation generally takes 2-3 weeks upon receipt of your full information. An Annual Organizer, any supporting Worksheets, and all documentation must be provided before we can begin. Returns are not processed while you wait. Once complete, a digital copy of your tax return with all supporting documentation will be provided on your Client Portal through email notification. Signature requests will be prompted to authorize the e-filing of your taxes. Your invoice will be provided with your tax return. Payment is taken automatically on the invoice's due date from the account submitted on your Payment Authorization Form. Receipt of E-file Authorization Signatures do not affect the invoice due date. If you disapprove your tax return, TAI may review and make adjustments which could accrue a redo fee if inadequate or incorrect information was provided by you.

Once all e-file authorization signatures are received and invoice payment is funded, your tax return will be e-filed.

In the event of paper filing a tax return, TAI will prepare the hard copy for mailing and provide instructions to complete. Your invoice must be fully paid and funded before we will release the paper filing copies to you.

All required information to prepare any tax return must be received 4 weeks before any IRS filing due date to guarantee on time filing. This includes extension IRS due dates.

Fees

Tax preparation fees are based on the complexity of the tax return and vary from client to client. This fee covers your tax preparation, a digital copy of your taxes, and filing of the tax return. This service may only be completed per the client's responsibility to sign the E-File Authorization forms and receipt of successful payment.

Payment is due when your taxes are completed. An invoice will be provided with your tax return with a due date reflecting 3 business days upon receipt. The account on your Payment Authorization Form will be processed as per our payment terms. TAI reserves the right to not process your tax return electronically until payment has funded.

Tax Return Preparation does not include any additional consulting/planning, assistance with notices, or contacting our office for a refund status. All are a separate billable services. Links to check status of refunds are available on our website or may be found on the state agencies websites. TAI charges $25 fee to check your refund status. Consulting appointments for all tax planning and inquiries are available as a billable service. Complex email or phone inquires may incur a fee depending on the accountants' time, research, or calculations involved.

There is no fee for a PDF digital copy of your tax return via the Client Portal. Clients are offered a one-time printed copy for $10 at the time of submitting their Annual Organizer for tax preparation. Additional copies or requests after submission will incur a fee of $25 per year/per copy.

Client Information & Conduct

TAI does not audit the information you provide. TAI may offer guidance, but reserves the right to not prepare a tax return that has inaccurate income or expenses or is considered misstated in any way. There are strict guidelines for preparers and licensed CPA's and we must adhere to those guidelines and will not jeopardize that license under any circumstance.

Extensions

Existing clients who have had personal taxes prepared by TAI in the previous tax season, that have not provided their information in time, or have made no contact will automatically be placed on a filing extension at no charge. This courtesy will remain active unless you request termination of services or we have not heard from you by the second tax filing year. If you are a new client, business client, or other organization type in need of an extension, please contact us

Print Name: ____

Signed:______________________________________ **Date:** ________________

THOMSON ACCOUNTANTS INC

Tax Return Engagement

Thomson Accountants, Inc. (TAI) will prepare your federal and state income tax returns based on the information you supply to us. This engagement pertains to the **current tax year**, and our responsibilities do not include preparation of any other tax returns due to any taxing authority.

It is your responsibility to provide all information required for the preparation of complete, accurate, and timely returns. We will furnish you with and you may access our website for annual worksheets to guide you in gathering the necessary information required for your tax situation. Existing clients may request a personalized checklist based on their prior year's return. Your use of such forms will assist us in keeping our fee to a minimum and efficiently processing your data. To the extent we render any accounting and/or bookkeeping assistance, it will be limited to those tasks we deem necessary for the preparation of the returns.

You represent that there is adequate substantiation to support deductions for any expenses claimed on the return. We will not audit or otherwise verify the data you submit to us, although we may request additional clarification on information. You are ultimately responsible for the accuracy of your return and should review it carefully before approving/signing it**.** You should retain all the documents, canceled checks, and other data which form the basis of your reported income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority request.

If there is an error on the return resulting from incorrect information supplied by you, or due to your subsequent receipt of any amended or corrected tax form(s), you are responsible for the payment of any additional taxes which would have been properly due on the original return(s), along with any interest and penalties charged by the taxing authority.

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 services based on our time and expenses incurred.

Our fee for these services will be based upon the amount of time required at standard billing rates plus out-of-pocket expenses. All invoices are due and payable upon presentation. **Tax returns are electronically filed only after payment is received and cleared.**

If the foregoing fairly sets forth your understanding, please sign below. However, if there are other tax return years you wish us to prepare, please inform us by noting so via email at **office@thomsonaccounting.com** and we will furnish you with an additional engagement letter.

Sincerely,
Thomson Accountants, Inc.

Print Name: ____

Signed:____ **Date:** __________________