Name(s): ____

Date of your appointment: ____________

Tax Year ______

J. Capra Tax

Tax Preparation for Entertainers and Others

213-618-8135 www.CapraTax.com 26893 Bouquet Canyon Rd. #C193, Santa Clarita, CA 91350

PLEASE READ ~ LOTS OF CHANGES FOR TAX YEAR 2022!!

In light of the ever-increasing threat of internet identity theft, please **password protect** any emailed documents, or make **COPIES** of your documents, and your filled-in Tax Packet worksheets, **keep the originals with you**, and use USPS Priority Mail Flat Rate (about $10.00) to send your documents to:
J. Capra Tax
26893 Bouquet Cyn. Rd. # C193
Santa Clarita, CA 91350

Once you have filled in the Simplified Tax Packet, *do this in December!*, and have received ALL of your tax docs, THEN you can book our appointment on my website on the BOOK IT! Tab. Whether we meet in person, or are working remotely, you MUST book an "In Person" or "Remote" appointment.

I must have received your completed tax packet and ALL of your tax documents no later than the day BEFORE your appointment. So if you book with me on the 11th, I must receive everything no later than the 10th. That means you will Mail all of your copies to me 4 days before your appointment, or Email the pdf no later than the day before your appointment.

If you email everything – MY PREFERRED METHOD – scan all of your tax documents, W-2s, 1099s, etc. into one pdf and your Tax Packet worksheets into a second pdf and send everything in ONE EMAIL with YOUR NAME in the subject line.

- Married Couples, please fill in ONE Tax Packet.
- I do not want to see your receipts. Signing the Engagement of Services Agreement (on the next 2 pages) says that you added up, and can prove, your numbers.
- I do not want your spreadsheets. Transfer your numbers into the Tax Packet. I keep my prices low because you "do the math" ;~)
- I do not want your check stubs. I DO want you to stack up your check stubs by payer, and make sure there's a W-2 or 1099 on top of each stack. This way you can get any missing tax documents BEFORE making our appointment. (*See page 2 for an unexpected benefit!*)
- If you have an **IRS IP PIN** you MUST give a copy of that letter to me. You'll get a new one every year.
- Fill-in this Tax Packet in **December – *now there's a great idea!*** As soon as you get ALL of your income, investment, interest and other tax documents, then and only then should you make our appointment.
- **You MUST be able to prove every number with receipts, not just bank statements …or guessing.**

ENGAGEMENT OF SERVICES AGREEMENT

J. Capra Tax

Tax Preparation for Entertainers and Others

213-618-8135 <> www.CapraTax.com <> 26893 Bouquet Canyon Rd. #C193, Santa Clarita, CA 91350

PRINT YOUR NAME(s): ____ DATE: ________________

This letter is to confirm our understanding of the terms and objectives of our engagement and the nature and limitations of the services I will provide. Our engagement is limited in scope and will be confined to the procedures and practices as set forth herein:

I will prepare your Federal income tax return, and income tax returns for the STATES OF _________________________, with supporting schedules, and perform related research as considered necessary (herein after known collectively as the "returns"). This engagement pertains only to the TAX YEAR ___________.

My engagement will be complete upon the delivery of the completed returns to you, unless you notify me that you require further tax services including, but not limited to, amendments, audit representation, extensions, past year returns, and any and all other services related to your income tax returns which you request.

The fees for my primary services are per, and as specified in, the accompanying schedule, and services not specifically identified therein will also be based on an hourly rate of **$300 per hour** or the scheduled rate I publish for that time frame of the current tax year. Your actual client fees incurred will be based on the complexity of your returns, and the time necessary to complete such services.

Based on what can be anticipated for your present expressed needs, I ***estimate*** that the fees you will pay to Jordana Capra/J. Capra Tax will range from **$300 - $900** (*see attached fee schedule on next page*) for preparing your Federal and any State income tax returns. This figure may change if more time and/or services other than written above prove to be needed, including services at a later date, such as preparing amendments and providing audit representation. If we anticipate our fees exceeding the aforementioned range, you will be presented the new fees in writing, so as to obtain your approval before continuing with the engagement.

Should my services for a given tax year extend for more than a one-year period, another Engagement of Services Agreement needs to be completed for each year of continuing work.

Please take special note that unless the processing of electronic filing is appropriate for your returns, you will be solely responsible to file any returns I prepare for you with the appropriate taxing authorities.

I will furnish you with my Tax Packet Worksheets to guide you in gathering and understanding the necessary information required for your tax preparation. Your thorough completion and use of these worksheets provide for the most accurate return, and assist me in keeping my fees to a minimum.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. I will not audit or otherwise verify the data you submit. Accordingly, my engagement cannot be relied upon to disclose errors, fraud or other illegal acts that may exist in the information you have provided. You are responsible for adopting sound accounting policies, for maintaining an adequate and efficient accounting system for safeguarding assets, for authorizing transactions and retaining supporting documentation for those transactions and for devising an internal control system that will help assure the proper preparation of financial statements.

Understand that should you choose to file a return in arrears of the current tax year, or when an amended return is appropriate, a refund is only available to you for 3 years prior to the current tax year.

Continued on next page...

ENGAGEMENT OF SERVICES AGREEMENT continued

In addition to the information you have placed in the Tax Packet, or other papers you may provide, you further acknowledge that to the best of your knowledge and belief during the interview/preparation process you have provided accurate, complete and full disclosure in your answers to any and all questions regarding income, expenses, deductions and exemptions in an effort to ensure that your return is prepared accurately.

To the extent I render any accounting and/or bookkeeping assistance, it will be limited to those tasks I deem necessary for the preparation of the returns and may lead to additional costs. Therefore, your commitment is essential to my ability to complete this engagement. Specifically, I must receive comprehensive information from which to prepare your returns within a reasonable period of time.

If, during our work, I discover information that affects your prior-year tax returns, I will make you aware of the facts. However, I cannot be responsible for identifying all items that may affect your prior-year returns. If you become aware of such information during the year, please contact me to discuss the best resolution of the issue.

It is always possible your returns may be selected for review (audit) by one or more taxing authority. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such tax examination(s), I will be available upon your written request to represent you during the examination and/or during any appeal for an additional hourly fee.

You should retain all the documents, receipts, records, canceled checks and other data that form the basis of income and deductions for at least Seven Years. 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 the returns and/or the e-file Signature Authorization Forms.

This engagement letter is contractual in nature, and includes all of the relevant terms that will govern the engagement for which it has been prepared. The terms of this letter supersede any prior oral or written representations or commitments by or between the parties. Any material changes or additions to the terms set forth in this letter will only become effective if evidenced by a written amendment to this letter, signed by all of the parties.

In acknowledgment and acceptance of these terms and considerations, and as client(s) of Jordana Capra / J. Capra Tax, (I) (we) hereby enter (my) (our) signature(s).

TAXPAYER SIGNATURE: ______________________________ DATE: ______________

SPOUSE SIGNATURE: ______________________________ DATE: ______________

RATE SCHEDULE

Based on a 90-minute tax return

January – February
$300

March 1 – 15
$350

March 16 – 31
$400

April – December
(and prior years) $450

This is my first rate increase in 5 years

For complex returns with multiple income sources and expenses that go on different schedules, you won't find a professional to do your tax return for less than $600-$800

Married Filing Joint
add $100

Single Member LLC
Add $250

Additional States add
$40 per state

Additional Time at $300 per hour
Charged in 15-minute increments

NEW: TAX DAY EXTENSIONS $40 > Request must be made by April 5th

A $50 cancellation fee will be charged for cancellations made within 24 hours. I must have your completed Tax Packet & ALL Documents 24 hours BEFORE your appointment.

IF YOU ARE MARRIED – PLEASE SHARE ONE PACKET

PRIMARY NAME ______________________________

fill in info below, ONLY if you are NEW or info has changed:

Occupation ______________________________

Soc. Sec. # ______________________________

Date of Birth ____________________ Blind Y N
month / day / year

Cell Phone ______________________________

Home Phone ______________________________

Email ______________________________

SPOUSE NAME ______________________________

fill in info below, ONLY if you are NEW or info has changed:

Occupation ______________________________

Soc. Sec. # ______________________________

Date of Birth ____________________ Blind Y N
month / day / year

Cell Phone ______________________________

Home Phone ______________________________

Email ______________________________

Address Unit # Zip Code City

Driver's License # ____________________ State ________

Issue date________ Exp. date ________ **NY'ers** Docu # ______

Driver's License # ____________________ State ________

Issue date________ Exp. date ________ **NY'ers** Docu # ______

FILING STATUS

❑ SINGLE

❑ MARRIED / JOINT

❑ SEPARATED
Incl. Spouse Name,
SSN & DOB above

❑ WIDOW(ER)
Date ________

❑ HEAD of HOUSEHOLD
Must be Single with
one or more dependents

DEPENDENT INFORMATION

(use addl. sheet if necessary)

Enter the dependent Code in the first column:

L = Child who lived with you N = Child who did not live with you due to divorce or separation O = Other Dependent

CODE	FULL NAME	SOCIAL SECURITY NUMBER	RELATIONSHIP	DATE OF BIRTH	# MONTHS LIVED W/ YOU LAST YEAR

CHILD CARE EXPENSES

(use addl. sheet if necessary)

(1) Care Giver ____________________ Federal ID # ______________ $__________

Address ______________________________ Phone______________

(2) Care Giver ____________________ Federal ID # ______________ $__________

Address ______________________________ Phone______________

BANK INFO ~ FOR ELECTRONIC REFUND OR AMOUNT DUE

❑ **CHECK BOX IF BANK INFO IS THE SAME AS LAST YEAR**

*fill in **ONLY** if you are **NEW** or your bank info has **CHANGED**:*

Bank Name______________ Routing #______________ Account #______________

Account Type: ❑ Checking ❑ Savings Name on account ______________________________

HEALTH CARE check one box:

❑ I had Covered CA or other Government Marketplace Insurance.
You **MUST** give me your form **1095-A** and a **California form 3895** (*If not CA, check to see if your state has a separate form*.)

❑ I had employer offered health insurance (for example SAG-AFTRA). How many months were you covered? ___________

❑ I had privately purchased health insurance. How many months were you covered? ___________

CHILD TAX CREDIT / DEPENDANT if you are claiming a child on your tax return you MUST give me a document for EACH child that includes (A) their name and (B) Your name, and/or (C) at least the last 4 digits of their SSN, for example, their Birth Certificate, Health Insurance Form, Social Security Card and I need a new copy EVERY year that you claim the child.

> Speaking of I.D., please make a one-page copy of your social security cards and your driver's licenses or other state issued photo I.D., and send along with your documents to me. (*It's also smart to keep a copy of your IDs and credit cards in a safe place*)

EXTENSIONS

Did you file any EXTENSIONS for your 2022 tax return? ❑ Yes ❑ No

Did you make any estimated tax payments WITH the extension? $__________

CRYPTO CURRENCY

Did you mine, buy, sell or exchange any virtual or crypto currency, use a virtual currency to pay for goods and services, or receive virtual currency as a payment for goods and services? ❑ Yes ❑ No

My prices have gone up after 5 years, but my **INCENTIVIZED PRICING** remains in effect! (prices are based on a 90 min. tax return)

Jan – Feb = $300
Mar 1-15 = $350
Mar 16-31 = $400
Apr – Dec = $450 (and all prior years)
Extensions = $40 request must be in by April 5th

Married Filing Joint = $100 additional
Extra States = $40 each
SMLLC = $250 *…if you don't know, you don't have it*
Overtime = $300 per hour, including consultations, amended returns, and non tax return work

No extra charge for postage, emailed PDFs, and a flash drive. $50 if you need *another* copy after you are e-filed.

A $50 cancellation fee will be charged for cancellations made within 24 hours

RENTAL or DRIVING INCOME or SINGLE MEMBER LLC? Download and fill in those worksheets.

ESTIMATED TAX PAYMENTS TOWARD YOUR 2022 TAX BILL

(IF YOU DON'T KNOW WHAT THIS IS, YOU DIDN'T MAKE ANY)

	FEDERAL	STATE	LOCAL
Quarter 1 = by 4-15-2022	$	$	$
Quarter 2 = by 6-15-2022	$	$	$
Quarter 3 = by 9-15-2022	$	$	$
Quarter 4 = by 1-15-2023	$	$	$

EVERYONE SHOULD FILL OUT THIS PAGE IF MARRIED FILING JOINT COMBINE YOUR NUMBERS

SELF PAID HEALTH INSURANCE including long term care, Medicare **supplemental**, but **not** life insurance **(Not from your W-2 or Soc. Sec.)**	$
MEDICAL EXPENSES not reimbursed by insurance. i.e. co-pays, dental, vision, glasses, therapy, prescriptions, PPE, ambulance, parking at medical facilities…	$
REAL ESTATE TAXES AKA **PROPERTY TAX**	$
HOME MORTGAGE INTEREST	$
PRIVATE MORTGAGE INSURANCE	$
INVESTMENT & LEGAL EXPENSES FOR BUSINESS write-in details:	$
EDUCATOR EXPENSES **K–12 Full-Time teachers only, to the max of $250**	$

		PRIMARY	SPOUSE
RETIREMENT PLAN CONTRIBUTIONS	TRADITIONAL =	$	$
Please wait to make any contribution until I do your Tax Return, you have until	SEP =	$	$
Tax Day to contribute for last year. (Do Not include 401-K money from W-2)	ROTH =	$	$

Please combine if multiple donations to the same recipient

CHARITABLE CONTRIBUTIONS OF **FUNDS** Name of charity:	Date	Amount
		$
		$
		$
		$
		$
use additional sheet if needed	**TOTAL**	**$**
CHARITABLE CONTRIBUTIONS OF **GOODS** **Name of charity:**	Date	Amount
		$
		$
		$
		$
		$
use additional sheet if needed	**TOTAL**	**$**

ALIMONY / SPOUSAL SUPPORT - If you finalized your divorce after January 1, 2019, the *former administration* eliminated the Federal deduction benefit, and reporting requirements of **alimony / spousal support**.

> If your divorce was finalized in 2018 or earlier, > What did you **pay** in spousal support last year $______________________

> What is your ex's SSN __________________ > What did you **receive** in spousal support last year $______________

> CA still allows this deduction and requires you to report the income.

WARNING: Are you a SIGNATORY on ANY accounts outside the U.S.?

At any time during the last year, did you have a foreign account that had a value, *for even one day*, of $10,000 U.S. Dollars or more? Then you MUST fill in the FBAR form available at http://BsaeFiling.fincen.treas.gov/main.html
I am not responsible for filing in this form …You are.

MAKING ESTIMATED QUARTERLY TAX PAYMENTS TOWARD THIS YEAR'S TAX BILL:

Go to **IRS.gov** (or call 1-800-829-1040)
Make a Payment
Bank Account (Direct Pay)
>>>do NOT choose debit or credit card –
they attach stupid fees!<<<
Make a Payment ...again...
REASON pull down to ESTIMATED TAX
Apply Payment to 1040 (for 1040 1040A, 1040EZ)
follow the instructions from there.
Look at what you earned in the last quarter, and make a payment of 20%.
Ideally you should do this on or BEFORE
April 15,
June 15th, (yes, June - Google it)
Oct 15th and
Jan 15 (for the last quarter of the previous tax year.)

Go to **FTB.CA.gov** (or call 1-800-852-5700)
Make a Payment
Bank Account
>>>do NOT choose debit or credit card –
they attach stupid fees!<<<
Use Web Pay Personal
Enter your personal info,
choose Estimated Tax Payment (Form 540 - ES)
Again, look at what you earned in the last quarter, and make a payment of 5%.
Ideally you should do this on or BEFORE
April 15,
June 15th, (Yes, June - Google it)
Oct 15th and
Jan 15 (for the last quarter of the previous tax year.)

PAYING OFF PAST YEARS TAX BILLS:

Go to **IRS.gov** (or call 1-800-829-1040)
MAKE A PAYMENT
BANK ACCOUNT (Direct Pay) never choose credit or debit as they attach stupid fees.
MAKE A PAYMENT ...again
Select a Reason, scroll down to TAX RETURN OR NOTICE
Select Type, choose 1040, 1040A, 1040EZ
TAX YEAR 2020
The rest is pretty self-explanatory

Go to **FTB.CA.gov** (or call 1-800-852-5700)
MAKE A PAYMENT
BANK ACCOUNT (NOT credit card – again stupid fees)
PAY BY BANK ACCOUNT
USE WEB PAY PERSONAL
Enter the requested info, then choose
TAX RETURN PAYMENT
The rest is pretty self-explanatory

Jordana Capra is a CTEC Registered Tax Preparer. This is being presented so that you are aware of the Tax Preparer Code of Conduct and Responsibilities as established by the California Tax Education Council. All CTEC certified tax preparers - -

- Must register as a tax preparer with the California Tax Education Council (CTEC).
- Must not violate provisions of Sections 17530.5 or 7216 of Title 26 of the United States Code prohibiting tax preparers from disclosing any information obtained in the business of preparing federal or state income tax returns unless (1) consented to, in writing, by the taxpayer in a separate document; (2) expressly authorized by law; (3) necessary for the preparation of the return; and, (4) pursuant to court order.
- Must maintain a $5,000 Tax Preparer Bond issued by a surety company admitted to do business in California. A tax preparer shall provide to the surety company proof that he or she is at least 18 years of age before a bond can be issued.
- Must not conduct business without having a current surety bond in effect.
- Must furnish evidence of a current bond upon the request of any state or federal law enforcement agency.
- Must not fail to sign a customer's tax return when payment for services rendered has been made.
- Must not fail to return, upon the demand by or on behalf of a customer, records or other data provided to the tax preparer by the customer.
- Must, prior to rendering any tax preparation services, provide the customer, in writing, with the tax preparer's name, address, telephone number, and evidence of compliance with the bonding requirement.
- Must complete, on an annual basis, not less than 20 hours of continuing education from an approved curriculum provider: (10 hours federal tax law, 2 hours ethics, 3 hours federal tax update and 5 hours California).

Jordana Capra / J. CAPRA TAX
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Bonded with Merchants Bonding Co.
CTEC # A237088
PTIN # P01452416

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