

Please complete and submit with your **PERSONAL** tax documents for preparation.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, sign this letter in the space indicated and return it to us with your tax documents. Thank you for the opportunity to be of service. If you have any questions, contact our office at the numbers listed below.

Accepted by:

\_\_\_\_\_  
*Responsible Party*

\_\_\_\_\_  
*Responsible Party*

\_\_\_\_\_  
*Printed Name*

\_\_\_\_\_  
*Printed Name*

**All responsible parties must sign for preparation of joint returns.**

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Date*

Please initial beside the tax returns or estimated tax coupons you would like us to prepare for you.

**Responsible Parties    Type**

- \_\_\_\_\_    \_\_\_\_\_    Federal Tax Return
- \_\_\_\_\_    \_\_\_\_\_    Schedule C
- \_\_\_\_\_    \_\_\_\_\_    Schedule E
- \_\_\_\_\_    \_\_\_\_\_    Schedule F
- \_\_\_\_\_    \_\_\_\_\_    State Tax Return (s)
- State 1 \_\_\_\_\_ State 2 \_\_\_\_\_
- Rent & Property Tax Rebate \_\_\_\_\_
- \_\_\_\_\_    \_\_\_\_\_    Local Income Tax Return (s)
- Locality 1 \_\_\_\_\_ Locality 2 \_\_\_\_\_ Locality 3 \_\_\_\_\_
- \_\_\_\_\_    \_\_\_\_\_    Federal Quarterly Tax Coupons
- \_\_\_\_\_    \_\_\_\_\_    State Quarterly Tax Coupons
- \_\_\_\_\_    \_\_\_\_\_    Local Quarterly Tax Coupons
- \_\_\_\_\_    \_\_\_\_\_    2848 Power of Attorney
- \_\_\_\_\_    \_\_\_\_\_    8821 Authorization to Release Confidential Info
- \_\_\_\_\_    \_\_\_\_\_    Extension of Time to File (*Request due by March 15*)
- Federal \_\_\_\_\_ State \_\_\_\_\_

**TMI Group, LLC**  
**PO Box 102, Confluence, PA 15424**  
**Confluence: 814-395-5567    Greensburg: 724-858-3213**