

# **2020 Client Organizer**

**Enclosed in this packet you will find the following:**

- 1. Important Information Sheet (FAQs)**
- 2. Engagement Letter**  
(please sign and return with your tax information)
- 3. Due Diligence Sheet**  
(please answer all 5 questions, sign and return with you tax information)
- 4. 2020 Client Organizer Questionnaire**  
(please complete only sections that apply to your situation)

*\*For faster processing at the Taxing Agencies, we recommend direct deposit of any refund and electronic withdrawal of any balance due. Complete banking information is required. Provide necessary information in the Organizer Questionnaire.*

I (we) certify, to the best of my (our) knowledge, that the information in and provided with this organizer is complete and accurate.

Taxpayer signature \_\_\_\_\_ Date \_\_\_\_\_

Spouse signature \_\_\_\_\_ Date \_\_\_\_\_