



12000 Market Street Suite 480 Reston, Virginia 20190

Anytime Tax Service LLC (ATS) has been in business for over 20 years and we specialize in taxation whereas many others do not. Rodney Warthem, Founder and CEO of Anytime Tax Service is a Federally Licensed Enrolled Agent by the United States Treasury Department and Internal Revenue Service (IRS).

Mr. Warthem, an Enrolled Agent, has earned the privilege of representing taxpayers before the Internal Revenue Service. The Enrolled Agent status is the highest credential the IRS awards. Individuals who obtain this elite status must adhere to very high ethical standards. Enrolled Agents are unrestricted as to which taxpayers they can represent, what type of tax matters they can handle and which IRS offices they can represent. Enrolled Agents are considered America's Tax Experts, and are the only federally licensed tax practitioners who specializes in taxation and have unlimited rights to represent taxpayers before the IRS.

Mr. Warthem is required to demonstrate to the IRS his competence in all areas of taxation, representation and ethics before he is given unlimited representation rights before the IRS. With this distinguished honor, Mr. Warthem advises, represents, and prepares tax returns for individuals, partnerships, corporations, estates, trusts, and any entities with tax-reporting requirements.

Rodney Warthem is a member of the Virginia Society of Enrolled Agents (VASEA), National Association of Tax Professionals (NATP), Maryland Society of Accounting Tax Professionals (MSATP), National Association of Enrolled Agents (NAEA) and the Maryland Society of Enrolled Agents

Anytime Tax Service will provide several key documents for your review and consideration. ATS Brochure, Client Letter, Direct Deposit Information, Engagement Letter, and Non-Disclosure Agreement, all of which is needed to complete your tax returns. Visit our website at www.anytimetaxservicellc.net to view current tax guidelines and email us with your tax questions. Anytime Tax Service reputation, credentials, and experience provides a tremendous value add to our customers. Call us today for a free consultation.

Thank you for your continued business and referrals. We look forward to working with you this year.

Sincerely,

Rodney Warthem

Rodney Warthem
Federally Licensed Enrolled Agent and Tax Professional
by the U.S. Department of Treasury and Internal Revenue Service



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In preparation for your tax returns, review the list of popular tax deductions and tax credits for individuals and businesses. This is not an all-inclusive list.

General Information

- Copy of the Prior Year Tax Return
- Social Security Numbers for You and Your Spouse
- Dependents' Names, Years of Birth, and Social Security Numbers
- Dependents' Post High School Educational Expenses
- Educational Expenses for You and Your Spouse
- Prior Year Adjusted Gross Income (AGI)
- Childcare Expenses Paid for Each Dependent
- Routing and Bank Account Number for direct deposit of refund(s)

Income and Deductions

- W-2 Form(s) for Wages, Salaries, and Tips
- 1095-A, B, C, Healthcare Forms
- 1099-INT & 1099-OID - Interest Income Statements
- 1099-DIV Dividend Income
- 1098 Home Mortgage Interest
- 1098 Home Equity Line of Credit (HELOC)
- 1099-B - Sales of Stock, Land, etc. for Capital Gains
- Mortgage Insurance Premiums
- Mortgage Points
- Real Estate Taxes Paid
- 1099-S - Sales of Real Estate
- 1099-G - State Tax Refunds, Unemployment Benefits
- Schedule 1 - Alimony Received or Paid
- 1099-G - Unemployment Compensation Received
- 1099-R - Distributions, Pension, Retirement, 401-K.
- SSA-1099 Social Security and Railroad Retirement Income
- 1098-T – School Tuition
- Schedule F - Farm Income and Expenses
- Schedule E - Rental Income and Expenses
- Form K-1 Income from Partnerships, Trusts, and S-Corporations
- Tax Deductible Miles Traveled for Business Purposes
- 1099-MISC Miscellaneous Income
- 1099-NEC Nonemployee Compensation
- Business Income
- Business Expenses: Office Lease, Cost of Labor, Employee Salary, Contracted Labor, Cost of Tools, Supplies
- Business Utilities: Mobile Phone, Landline telephone, Internet, Gas, Water, Electric, Sewer & Trash

Estimated Tax Payments

- Estimated Tax Payments Made with ES Vouchers
- Last Year's Tax Return Overpayment Applied to This Year

Tax Credits

- Child Tax Credit
- Earned Income Tax Credit (EITC)
- Childcare Provider Address, I.D. Number and Amount Paid for the Child and Dependent Care
- Adoption Expense Information for the Adoption
- Foreign Taxes paid

Tax Deductions & Expenses

- Out of Pocket Medical/Dental/Vision
- Medical Insurance Paid
- Prescription Medicines and Drugs
- Hospital and Nurse Payments (Contracted Labor)
- Tax Deductible Miles Traveled for Medical Purposes
- State Taxes Paid with Last Year's Return
- Personal Property Taxes Paid
- Charitable Cash Contributions/Donations
- Fair Market Value of Non-cash Contributions to Charities
- Unreimbursed Expenses Related to Volunteer Work
- Tax Deductible Mileage for Volunteer Purposes
- Casualty and Theft Losses
- Amount Paid to Professional Tax Preparer Last Year
- Investment Expenses
- IRA Contributions
- Student Loan Interest Paid
- Vehicle Cost and Expenses

1099-MISC Income for Independent Contractors

- Business Consultants
- Minister and Clergy
- Security Officers
- Home Health Nurse
- Real Estate Professionals
- Police Officers
- Project Managers & Consultants
- Commercial Truck Drivers
- Entertainers
- Mechanics



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DIRECT DEPOSIT & E-FILE INFORMATION



Note: *Monies can be deposited into multiple accounts. Customers must provide a voided check for either a savings or checking account for election of direct deposit for tax refund. The voided check must include the taxpayer's name, address, and routing and account number.*

Bank, Credit Union Name: _____

Routing #: _____

Account #: _____

Email Address: _____

Bank, Credit Union Name: _____

Routing #: _____

Account #: _____

Email Address: _____

Bank, Credit Union Name: _____

Routing #: _____

Account #: _____

Email Address: _____

I certify that the information above is true to the best of my knowledge with my signature below.

Signature _____ **Date** ____/____/____

All information will be kept confidential and will be used in accordance to Privacy Rules and Guidelines, and will not be supplied to anyone not required by Federal and or State laws in the Taxpayer State of residence.



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ENGAGEMENT AGREEMENT

Thank you for choosing Anytime Tax Service LLC to assist you with your tax needs. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

Anytime Tax Service LLC will prepare your Individual, Business, Corporate, Estate (Federal and State) income tax returns. Anytime Tax Service LLC will not audit or verify the data you submit; however, we may ask to clarify the information received. Anytime Tax Service will be available to assist and guide you in gathering the necessary information.

It is your responsibility to provide all the information necessary to complete your tax returns. You should retain all documents, receipts, and canceled checks and other records to substantiate the items of income and deductible expenses that are claimed on your return. Since you have the final responsibility for the information in your income tax returns, we highly recommend that you review the tax returns carefully for completeness, accuracy, misstatement or misrepresentation of fact before signing and filing them.

Your returns are subject to review by taxing authorities. Should a tax inquiry or an examination occur, Anytime Tax Service will be available to answer questions or to represent you for an additional fee.

Fees for our services will be at our standard posted rates as identified in our client letter. Our invoices are due and payable upon presentation and are due immediately.

NON-DISCLOSURE AGREEMENT

Definition of Confidential Information means non-public information that parties to this Agreement designates as being confidential. Anytime Tax Service recognizes Confidential Information to be any information or personal data that it receives from the Client in the process of tax preparation or planning.

Obligations Regarding Confidential Information. Anytime Tax Service will not to disclose any information to which it has access in the process of the performance of a Client engagement. Anytime Tax Service agrees to only request Client information necessary to carry out services requested by the Client.

Under no circumstances will Anytime Tax Service disclose Client information to a third party.

Anytime Tax Service recognizes that the duties of secrecy and non-disclosure shall apply indefinitely even after all service engagements have terminated.



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Anytime Tax Service shall maintain the technical and organizational steps required to safeguard data and to prevent alteration, loss and unauthorized processing or access. These steps refer to the files, processing, premises, equipment, systems, and programs.

Anytime Tax Service does not agree to hand back and destroy copies of completed returns as the best practice is to keep the work on hand.

Anytime Tax Service shall notify the undersigned Client immediately upon discovery of any unauthorized use or disclosure of Confidential Information or any other breach of this Agreement. Anytime Tax Service will cooperate with the Disclosing Party in every reasonable way to help the Disclosing Party to regain possession of the Confidential Information and prevent its further unauthorized use or disclosure.

Anytime Tax Service shall not subcontract the provision of any services agreed herein in whole or in part.

If the foregoing is in accordance with your understanding of the terms and conditions of our engagement, please sign and date where indicated on this letter.

We wish to express our appreciation for this opportunity to work with you, and we are always available to discuss or clarify any part of this engagement and non-disclosure letter with you.

Taxpayer / Client Printed Name	Taxpayer / Client Signature	Date
Spouse / Client Printed Name	Spouse / Client Signature	Date
Rodney Warthem (Federally Licensed Enrolled Agent and Tax Professional)		Date