

**Request for Quote on Individual Tax Return Preparation**

Year: 2016

**Current Year Transactions (check all that apply)**

- Income and deductions are similar to last year
- Started or purchased new business
- Sold rental property
- Exchanged property
- Changed jobs
- Change in Marital status
- Purchased or refinanced property
- Sold stock or Mutual fund. \_\_\_\_\_ Cost of stock not known. \_\_\_\_\_ ISO's
- More than 5 stock sales last year
- Other: Please list any special complications regarding your return

**Records to be Furnished by you (check all that apply)**

- Completed tax organizer last year and will complete tax organizer this year
- I desire an appointment to go over my records
- I will mail in my records
- Copies of all 1099's, K-1's, and W-2's will be made for your file.
- I have records for all claimed deductions
- Copies of checks for tax payments will be provided
- All estimated tax payments were made on time

**Services Desired (check all that apply)**

- Federal and California Income Tax Return preparation
  - Estimated tax vouchers for 2003-No substantial change in income
  - Estimated tax vouchers for 2003-I expect my income to significantly change
  - Tax Projection for 200\_\_\_\_.
  - Other: Please list (Businesses – see engagement letter)
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Based on the above information, the fee to do your taxes is:

\$\_\_\_\_\_ Other terms of the Individual Tax Return preparation engagement letter are still in force.

Martin Friedrich, CPA \_\_\_\_\_ Date \_\_\_\_\_

Agreed and accepted \_\_\_\_\_ Date \_\_\_\_\_

Print Name \_\_\_\_\_