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**SMALL BUSINESS ENGAGEMENT LETTER REQUEST**

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**Please provide a proposal for the following service:**

Tax Preparation

Tax Consulting

Tax Planning

QuickBooks® Consulting

Financial Statement Compilation/Review/Audit

For Fiscal Year Ended \_\_\_\_\_

**General Information**

Our company does not have a prior year tax return.

Our company has a prior year tax return. (please attach State, Federal, and local returns)

If your company has had a prior year's taxes prepared externally,  
has the preparer who performed this service been paid?

How is your company organized? (S-Corp, LLC, etc) \_\_\_\_\_

Company's Legal Name: \_\_\_\_\_

In what States/Countries does this company operate: \_\_\_\_\_

President/Owner/CEO's Name: \_\_\_\_\_

Year Company Was Established: \_\_\_\_\_

Have there been any unusual items during the year? (being audited, litigation, opened offices in a new state, etc)

**Please send the proposal to:**

Name: \_\_\_\_\_

E-mail address: \_\_\_\_\_

Phone: \_\_\_\_\_

Address: \_\_\_\_\_

Position: \_\_\_\_\_

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**\*Please attach the prior year Federal, State, and local tax returns if applicable, the YTD  
financials if not.**

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Return this form via e-mail to: [cpa@SchwindtCo.com](mailto:cpa@SchwindtCo.com) or via fax: (503) 227-1423.