

Solestine M. Lancaster, CPA

AUTHORIZATION TO PREPARE TAX RETURNS

Upon your authorization, we will prepare your **2017** Federal and State personal income tax returns from information furnished to us by you, based on our understanding of the current tax laws. We will not audit or check the data you submit; although, we may ask you to clarify it.

Your individual tax returns are due to be filed by April 16th. Extensions beyond this date must be formally requested so please let us know whether to do so by completing the box below. If there are certain tax issues that you wish to discuss related to your tax returns, please call to schedule an appointment at your earliest convenience. Otherwise, we will look for your records between **February 5, 2018 and March 1, 2018.**

We want to remind you that you have the final responsibility for the completed income tax returns; therefore, you should review and understand them and get your questions clarified, before you sign to authorize for filing electronically or by mail. You must maintain records to support all numbers reported, including, but not limited to cancelled checks and receipts, as well as bank statements, deposits, income sources and legal documents.

The taxing authorities can audit your returns. In the event of governmental tax audits, we will be available, upon request, to assist you. You will be billed separately for those services at our standard hourly rates.

Fees for your services will be at our standard hourly rates. **Payment is due at the time of completion of all income tax returns.**

If the above explains your understanding, please sign below. On a joint return, both taxpayers must sign. Please call us at (704) 343-2705 if you have any questions. **ALL returns must be submitted electronically. Please indicate your 5-digit PIN number to serve as your electronic signature. (The personal identification number, PIN, can be any five numbers you choose, or we can use the last 5 of your social sec. number.) We also need the Driver's License number for each filer.**

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AUTHORIZED BY:

PRINTED TAXPAYER'S NAME

PRINTED SPOUSE'S NAME

SIGNATURE (TAXPAYER) DATE

SIGNATURE (SPOUSE) DATE

DRIVER'S LICENSE STATE & NUMBER / 5 DIGIT PIN

DRIVER'S LIC. STATE & NUMBER / 5 DIGIT PIN

DL: ISSUE DATE / EXPIRE DATE

DL: ISSUE DATE / EXPIRE DATE

REQUEST FOR FILING EXTENSION

An automatic **filing extension can be requested to October 16th**, please check below to let us know whether to do so on your behalf. **An extension to file is not an extension to pay.** The IRS imposes a 5% per month **late filing penalty** (NC 10%) the IRS and NC impose and a ½% per month **late payment penalty** on all unpaid balances. North Carolina requires all taxes to be paid with the extension for the extension to be valid.

- Yes, I plan to extend my tax returns. I would like to pay \$_____ with the N.C. Extensions.*
- Yes, I plan to extend my tax returns. I do not expect to owe additional N.C. taxes.*

If you checked "Yes", mail, fax - (704) 342-3777, or e-mail this authorization by April 6th
(slancastercpa@bellsouth.net, P.O. Box 31791 - Charlotte, NC 28231)