

I understand and consent to the following authorizations:

PRIVACY POLICY

It is the policy of Leonard D. Rea & Co., to handle the information you provide us with the utmost confidentiality and care. Your personal information will only be shared with members of our firm or tax colleagues who work on behalf of our firm who need to know this information in order to complete the work you have hired our firm to do. We will not disclose your personal and confidential information to anyone outside our firm without your express written permission to do so or unless we are legally required to do so. We maintain physical, electronic and procedural safeguards to protect your information.

Initial: _____

ENGAGEMENT OF SERVICES

We will prepare your 2009 Federal & State individual income tax returns from the information that you furnish us. We will not audit the data you submit to us; however, we may ask you to clarify some of the information. It is your responsibility to provide all the information necessary to complete your tax returns and to maintain, in your records, the documentation (e.g., receipts, cancelled checks) necessary to support the items of income and deductible expenses claimed on your tax returns. These may be necessary to prove the accuracy and completeness of the returns to the taxing authority. Since you have final responsibility for the information on your tax returns, we highly recommend that you review the tax returns carefully before signing and filing them. If you have any questions as to the type of records required, please ask us for advice in that regard. You agree to submit all requested information within one week of such request and to pay for all services rendered at time of delivery. Outstanding invoice amounts are subject to interest at 18% compounded monthly.

Initial: _____

IRS/STATE DOR CHECKBOX AUTHORIZATION

You may authorize the IRS or the Department of Revenue to contact your tax return preparer if they have any questions regarding the processing of your tax return after it is filed. Very often, questions that arise during processing can be easily resolved by telephone. If you agree, we will be authorized to answer those questions for you.

Initial: _____

IRS e-file SIGNATURE AUTHORIZATION

With your permission, we can "sign" your electronically filed Federal tax returns with a Personal Identification Number (PIN). You will need to sign the IRS e-file Signature Authorization forms for both IRS and Massachusetts or other state.

Initial: _____

FINANCIAL PLANNING DISCLOSURE AUTHORIZATION - IRC §7216

We also offer tax and investment advice and financial Planning in connection with the purchase of IRAs and mutual funds among other things. Our policy and the law require a high level of privacy. If you want to take advantage of this additional service, you will need to complete a separate disclosure. Initial this box if you are interested in any of these services.

Initial: _____

ACKNOWLEDGMENT AND CONSENT:

Taxpayer

Spouse

Date