



ELECTRONIC TAX FILING

and

TAX PREPARATION PACKET

"Once a Client - Always a Client"

Visit us at our website www.cubetax.com

If you have any questions, contact

CUBE TAX SERVICE

512.833.7856 or 972.661.0334

email at fdustin@cubetax.com

WHAT IS ELECTRONIC FILING?

Cube Tax Service, an "Authorized IRS e-file Provider", is pleased to offer you a quick and convenient method to file your federal (and state) income tax return - **ELECTRONIC FILING**. Cube Tax Service using the latest income tax software will professionally prepare or check your return for accuracy and then electronically file your return. If any discrepancies are found, you will be notified before your return is transmitted to the IRS, so the necessary changes can be made to avoid IRS penalties and interest. **However, electronic filing does not guarantee that your return will not be audited.**

Current IRS regulations requires all paid tax preparers file all returns prepared by them to be e-file this year. Your return will be filed electronically except is some rare cases where the IRS does accept certain forms electronically. "Due" as well as "Balance Due" tax returns may be electronically filed.

If the IRS adjusted your 2009 refund and/or you received an IRS 3094 Form Letter, you need to call Cube Tax Service before sending your information to us.

WHY DIRECT DEPOSIT?

Direct Deposit means your tax refund will not be delayed or lost in the mail. The IRS will directly deposit your tax refund in your checking or saving account in as few as five days from the time the IRS has accepted your return. Cube Tax Service must have proof of the account in which you want your tax refund direct deposited (**A voided check or any other pre-printed document provided by your financial institution verifying account ownership**).

FREE Electronic Filing with paid Cube Tax Service Tax Preparation!

COST TO HAVE CUBE TAX SERVICE PREPARE YOUR TAX RETURN

| | | |
|----------------|---------|---------|
| Basic Return*: | 1040 EZ | \$50.00 |
| | 1040 A | \$60.00 |
| | 1040 | \$70.00 |

***Additional charges for other required Forms and Schedules.**

HOW TO HAVE CUBE TAX SERVICE PREPARE YOUR TAX RETURN

1. Complete Sections I & II in this Packet.
Phone numbers, dates of birth and signature(s) are required.
Attach a copy of last year's return, if not done by Cube Tax Service.
2. In an envelope enclose:
 - Completed Section I & II
 - Original - Copy B of all W-2(s), 1099R(s), 1099DIV(s), and 1099B(s)
 - Copy of a picture ID Card (Drivers License) and Social Security Card(s)
3. Mail to Cube Tax Service, 10711 Burnet Road, Suite 325, Austin, TX 78758.

We will contact you with the amount of your refund or balance due, the preparation fee, and to discuss the next step.

4. Once the IRS has accepted your return, Cube Tax Service will send you a copy of your Form 8879 for your records.
5. **DO NOT MAIL ANYTHING TO THE IRS!**

Section I: General Information

Did the IRS adjust your 2010 refund? Y/N Did you receive an IRS 3094 Letter? Y/N
 Did you receive a Form 8836? Y/N **(If yes, completed Form 8836(s) must be sent to Cube Tax Service)**

Address: _____ City: _____ State: ____ Zip Code: _____
(PO Box only if PO will not deliver to your home)

Daytime Telephone: _____ Evening Telephone: _____ Cell: _____

Your email address: _____ (To let you know when your return has been accepted)

| | First Name | MI | Last Name | Date of Birth | Social Security # | Relationship | # Mos In House |
|-----------|------------|----|-----------|---------------|-------------------|--------------|----------------|
| Taxpayer | | | | | | XXXXX | XXXXX |
| Spouse | | | | | | XXXXX | XXXXX |
| Dependent | | | | | | | |
| Dependent | | | | | | | |
| Dependent | | | | | | | |
| Dependent | | | | | | | |
| Dependent | | | | | | | |
| Dependent | | | | | | | |

Filing Status: Single: ____ Head of Household: ____ Married Filing Jointly: ____ Married Filing Separately: ____

If you selected Married Filing Separately you do not qualify for electronic filing and the dependent care; EIC; hope and lifetime education credit; and adoption credit generally are not available.

SIGNATURE

I understand that Cube Tax Service provides tax preparation service and is not a tax consultant and does not provide tax advice. To the best of my knowledge and belief the information provided to Cube Tax Service is true, correct and complete. I understand that Cube Tax Service does not withhold their fee from my refund.

Signature _____ Date _____ Signature _____ Date _____

Section II: Additional Information Needed to Have Your Return Prepared

Sources of Income:

W-2 ___ NO or ___ YES #? _____ (attached)
Interest ___ NO or ___ YES (attach 1099INT)
Dividends ___ NO or ___ YES (attach 1099DIV)
Rental ___ NO or ___ YES
Social Security ___ NO or ___ YES (attach 1099Soc Sec)
Other _____

Distributions:

IRA ___ NO or ___ YES (attach all 1099R Forms)
Pension ___ NO or ___ YES (attach all 1099R Forms)

**Attach a copy of last year's return, if not done by
Cube Tax Service.**

SELF-EMPLOYED INCOME/EXPENSES:

RENTAL INCOME:

Address of Property/Income/Expenses:

IRA CONTRIBUTIONS MADE FOR TAX YEAR 2009:

| | <u>Deductible</u> | <u>Non-Deductible</u> | <u>Roth</u> |
|-------------|-------------------|-----------------------|-------------|
| Taxpayer \$ | _____ | \$ _____ | \$ _____ |
| Spouse \$ | _____ | \$ _____ | \$ _____ |

DEDUCTIONS:

___ Itemized or ___ Standard (if you paid real estate taxes on your home list below)

Home Interest \$ _____ **Real Estate Taxes** \$ _____

Contributions: Cash \$ _____ Non Cash \$ _____

Attach 1098C valuation if you donated a car or boat.

State Sales Paid: \$ _____

Other Deductions: _____

CHILD CARE PROVIDER INFORMATION:

| <u>NAME</u> | <u>ADDRESS</u> | <u>EIN or SS#</u> | <u>\$ AMOUNT</u> |
|-------------|----------------|-------------------|------------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

Number of your children cared for _____

ADDITIONAL INFORMATION:

NOTE: Attach any 1098's received. If 1098 is not available you **MUST** provide the Name, Address and EIN or SS# of any individual to which you paid interest. This includes interest paid on any home mortgage, rental property, business equipment etc.
