

Tax Engagement Letter and Questionnaire

1. In your email, you'll receive an email from DeLeon & Stang CPAs via DocuSign. You may need to check your spam folder.



2. Open the email and click the yellow Review Document button  to sign your tax engagement letter and to fill out the questionnaire.

3. Click the blue OK button to accept that the website uses cookies.

4. Click the yellow Continue button to proceed to the document.



5. Review the engagement letter and questionnaire. You can scroll through the document on your own or click the yellow Next button  to go to the next required section.

6. Click the yellow Start button  to sign the engagement letter and to fill out the questionnaire.

7. Click on the Sign button  to enter your signature. Depending on the device you are using you can sign your name with your finger or stylus or your name will be printed in italics.

8. Checkmark the box for Yes or No for the remaining questions. Please note, some questions if answered Yes, will require you to enter additional information. A red box

will appear if the field is required.

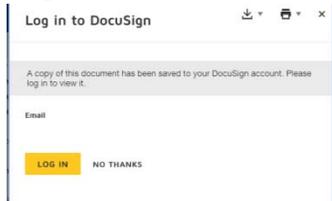
What is your preferred means of communication (choose one):
Email (please provide):
Phone (please provide):
Mail

9. Once all questions are answered, click the yellow Finish button . If you forgot to answer a question you'll be prompted to answer the question(s) before being able to

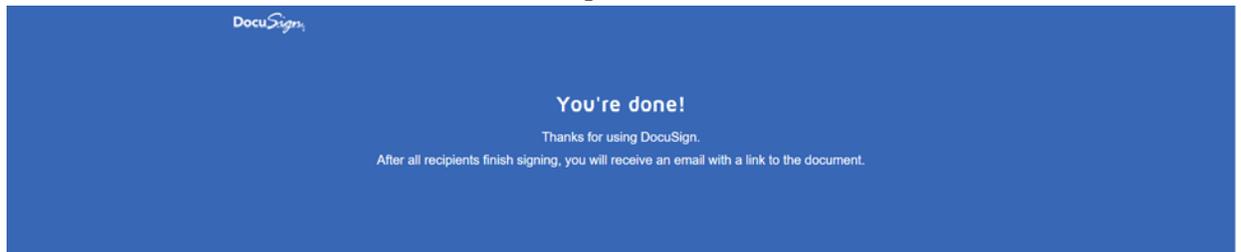
complete the document. You can save and finish later by click the option under Other Actions.



10. Once you click the Finish button  you can choose to create an account with DocuSign which will contain your completed document. This same account will contain your signed efile forms when you complete them later in the year. Or you can click No Thanks. Either way, you'll receive an email with the completed document and your responses.



11. Once you click through the above message, you'll receive this page. Please note, for the tax engagement letters and questionnaire, you are then only recipient. For Efile forms or other document there could be additional recipients.



12. In your email is the completed document which contains an attached PDF file with your responses. You do not need to forward this email to your point of contact at DeLeon & Stang CPAs. Once you complete the document, DeLeon & Stang CPAs automatically receives the completed document.

DeLeon & Stang CPAs via . Completed: Tax Engagement Letter and Questionnaire Your document has been completed VIEW COMPLETED DOCUMENT DeLeon & Stang CPAs joanie@deleonandstang.com All parties have completed Tax Engagement

Should you have any questions or comments please email esign@deleonandstang.com or call (301) 948-9825.