



404 Lake Street, Antioch, Illinois 60002 | 888-SANSKAR (726-7527) | team@sanskar.com

Happy New Year! 🎉 As we step into 2025, we're grateful for your trust and partnership. To kick off the year, we're excited to introduce an important upgrade to our client experience: **Canopy Tax**, a secure, convenient, and easy-to-use app designed to enhance your interaction with us.

Why the Upgrade?

We have never (*knock on wood*) had a data breach, but we are paranoid about security and believe in investing heavily in it. Unlike most of our industry peers, we have been avid Apple computer users since 2011, given their strong built-in security features!

In recent months, our paranoia has increased tenfold, not only due to the typical ransomware and phishing scams but also because cybercriminals recently exploited nine telecommunication networks, risking sensitive data!

Introducing Canopy Tax

To avoid these risks, we've chosen **Canopy Tax**, a modern, secure platform that ensures your data is protected and your tax experience is streamlined. With Canopy Tax, you'll benefit from:

1. **Enhanced Security:** SOC 2 compliance ensures your data is safeguarded with top-tier encryption and security protocols.
 2. **Convenience:** Securely upload documents, access your records, and communicate with us from anywhere, anytime.
 3. **Fraud Prevention:** Securely storing sensitive information can reduce the chances of identity theft related to tax filings.
 4. **Faster Resolutions:** We can quickly address any issues with everything organized in one place.
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How to Get Started

Follow these simple steps to set up your Canopy Tax account:

1. **Check Your Email:** You should receive an invitation from us with a secure link to create your account; if you don't, email us at team@sanskar.com.
2. **Set Up Your Login:** Create a strong password (15+ characters, with letters, numbers, and symbols).
3. **Download the Smartphone App:** Use links below or search Canopy Tax Portal.

- a. iPhone users: [Download from the App Store](#).
 - b. Android users: [Download from Google Play](#).
4. **Log In:** Use your credentials to access your account, and you'll be ready to upload tax documents, communicate with us, sign forms authorizing us to e-file your tax return, and even pay for your tax return with our invoice provided.
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Need Assistance? Some helpful links are below:

1. [Introduction to the Canopy Tax Portal](#)
2. [Creating an Account and Logging into the Canopy Tax Portal](#)
3. [Navigating within the Smartphone App Canopy Tax Portal](#)
4. [How to Scan and Upload a Document in Canopy Tax](#)

If you still need help setting up or navigating the app, don't hesitate to email us at team@sanskar.com or call us at 888-SANSKAR (726-7527) or 847-395-7444.

Our 404 Lake Street, Antioch, Illinois, 60002 office is still open!

Since telephone networks have recently been hacked, please **do not email or fax us your tax documents**. Instead, use the Canopy Tax Portal with your login and password.

Our office in Antioch is still available to drop off or FEDEX your tax documents (we do not use USPS for tax correspondence, given the risk of data theft).

Thank You for Trusting Us All These Years!

We're committed to providing you with the security tools and support to make tax season as stress-free as possible. Here's to a prosperous and secure 2025! 🥂

Sonal, Joe, Pam, and Jay



sanskar

engagement letter for income tax preparation

This agreement is between Sanskar Tax Advisors, Inc. and:

(list out your name and / or your spouse as well here)

For the Preparation of the Following:

- | | |
|---|--|
| ☐ Personal Tax Return | ☐ Estate / Trust Tax Return |
| ☐ Corporate Tax Return | ☐ Non-Profit Tax Return |
| ☐ Partnership Tax Return | ☐ Other _____ |

For the Following Tax Year(s):

- ☐ 2024 ☐ _____

This agreement is to confirm that (please initial):

- ☐ _____ **We will prepare your federal and state tax returns listed above** and implement our 4-step checking system for quality control and accuracy, which requires extra tax preparation time.
- ☐ _____ **You will provide us with your tax documents before April 1, 2025, to prepare the tax returns. If your tax documents are submitted after April 1, 2025, you will incur a 50% overtime charge.** We do not have the capacity for last-minute submissions. We will automatically take an extension for you and will not be liable for any interest charges incurred if you owe taxes.
- ☐ _____ **You have statements and records to substantiate all expense deductions and income receipts, including from cryptocurrency trades** (which the IRS requires to declare).
- ☐ _____ **You will review your tax return before we e-file it.**
- ☐ _____ **Payment is due when we e-file your returns. We will debit the bank account we use on your tax return for our fees.** We will e-file your tax return with your written or verbal communication.
- ☐ _____ **If a tax agency (Federal or State) sends a notice for additional taxes due to a missing document you did not provide, the additional taxes and interest / penalties will be your liability.** If the error is the fault of Sanskar Tax Advisors, Inc., we will only be liable for any interest and penalties incurred, not the additional tax liability.
- ☐ _____ **Our fees are based on the forms needed to file your returns** and do not include fees for responding to tax agencies' inquiry letters or audit work. We charge \$200 an hour for response letters and audits.
- ☐ _____ **We do not disclose any nonpublic personal information about our clients** or former clients to anyone unless you have specified other parties we should work with. We restrict access to nonpublic personal information to only our staff preparing your income tax returns and maintain physical, electronic, and procedural safeguards to protect your non-public information.
- ☐ _____ **We do not send emails to AOL, Yahoo, or Hotmail addresses** due to their history of multiple malware and phishing break-ins and the risk that our newsletters will go to junk mail. Gmail addresses are preferred at a minimum. Please mark team@sanskar.com as "not junk" in your email system.

Signature _____ Date _____



Our Client Information Tax Update Form

If your tax information is the same as last year, just fill in the shaded boxes, including your bank information for your tax refund / payment and for our tax preparation fees. If there is any new information or extra notes, please don't be shy to list below.

BASIC INFORMATION	
Last Name	
First Name Taxpayer	Social Security #
	Date of Birth
First Name Spouse	Social Security #
	Date of Birth
Address	
City, State, Zip Code	
CONTACT INFORMATION	
Cell Number #1	Cell Number #2
Home Number	Email Address
DEPENDENT INFORMATION	
Dependent #1	Social Security #
	Date of Birth
Dependent #2	Social Security #
	Date of Birth
BANK INFORMATION FOR DIRECT DEPOSIT	
Bank Name	Routing Number
Account Number	Checking or Savings?
OTHER TAX INFORMATION, DEPENDENTS & QUESTIONS	
The above information is true and correct, and I / we understand that the information given here will be used to complete our Tax Return. I / We agree to hold Sanskar Tax harmless for any errors made on this questionnaire and that any errors or questions will cause a delay in processing of the return and receipt of my refund, if any.	
Taxpayer Signature	Date
Spouse Signature	Date



Our Tax Preparation Checklist

First Name, (Spouse), and Last Name

GENERAL DOCUMENTS

☐	Prior Year Tax Return	Only if new client or referral	
☐	Estimated Tax Payments to IRS	Bring cancelled check / stubs	Amount
☐	Estimated Tax Payments to State	Bring cancelled check / stubs	Amount

INCOME TAX FORMS

☐	Salaries from All Employers	Form W-2	# Forms	
☐	Pension, Retirement, IRA Income	Form 1099-R	# Forms	
☐	Social Security Income	Form SSA-1099	# Forms	
☐	Interest Income	Form 1099-INT	# Forms	
☐	Dividend Income	Form 1099-DIV	# Forms	
☐	Unemployment Income	Form 1099-G	# Forms	
☐	Lottery or Gambling Winnings	Form W2-G	# Forms	
☐	Debt Cancellation Notice	Form 1099-C	# Forms	
☐	Partnership / Corp / Estate Income	Form K-1	# Forms	
☐	Last Year's State Tax Refund	State Notice	Amount	
☐	Other Income	Form 1099-Misc or Add Up	Amount	
☐	Rental Property Income	Call Us for Expense Checklist	Amount	
☐	Farm Income	Call Us for Expense Checklist	Amount	
☐	Small Business Income	Call Us for Expense Checklist	Amount	

DEDUCTIONS TAX FORMS

☐	Number Dependents in House	Living with You > 50% of Year	How Many?	
☐	IRA Contributions	For Current Year	Amount	
☐	Charitable Donations (Cash)	Separate & Bring Receipts	Amount	
☐	Charitable Donations (Non-Cash)	How Many Bags Given Away?	Amount	
☐	Child Care Expenses	Name, Tax ID, Address, Phone	Amount	
☐	Health Insurance + Expenses	Form 1095 + Medical Expenses	Amount	
☐	Mortgage Interest Statements	Form 1098	Amount	
☐	Real Estate Taxes Paid	Bring Receipt with Lot #s	Amount	
☐	College Tuition Expense	Form 1098-T	# Forms	
☐	College Other Expenses	Books, Computer, Supplies	Amount	
☐	If You Are A School Teacher...	Checkmark This Box	Yes or No?	
☐	Student Loan Interest	Form 1098-E	Amount	
☐	Sales Taxes Paid (e.g., Cars, Boats)	Bring Receipts	Amount	
☐	If Your Purchased a New Home....	Bring Closing Statement	Price	

CAPITAL GAINS / LOSSES TAX FORMS

☐	Sales of Stocks, Mutual Funds or Bonds	Bring all 1099-B Forms
☐	Bring All Purchase Dates & Costs of Investments Sold	Bring Old Documentation
☐	If You Sold your Home... Bring Closing Documents	Bring 1099-S Form