

## TAX PREPARATION/BOOKKEEPING SERVICES

## SUPPLEMENTAL APPLICATION

	Арр	olicant:
	1.	Does the applicant employ or use Certified Public Accountants in the performance of services for clients?  YES NO
	·	If YES, please provide details:
	2.	Does the applicant provide legal advice, render opinions or otherwise interpret tax laws or rulings or accounting rules, standards or principles?  YES NO
		If YES, attach a description of such activity.
	3.	Does the applicant supervise or manage any investment or trust funds on behalf of clients?  YES NO
		If YES, attach a description of such activity.
	4.	Attach a description of the training period provided or required of employees.
	5.	Indicate the percentage of estimated gross receipts derived from each of the following:
		a. Tax Returns – Individuals %
		b. Tax Returns – Businesses %
		c. Bookkeeping – Individuals %
		d. Bookkeeping – Businesses %
	6.	Does the applicant perform audits/reviews of compilations of business tax returns?  YES NO
t is understood and ag and Omissions Insurar	greed that this sunce.	applemental application shall become a part of the application for Professional Liability Errors
Name of applicant:		
Signature of person au	thorized to exec	cute on behalf of the applicant:  Date:

A copy of this application should be retained for your records.