

2021 Tax Preparation Program



Required Attachments

Application

Incomplete applications delay processing. Please submit application with the following:

- Application and forms are complete Residency Form attached or currently on file
 Relationship Disclosure Form Supporting documents for Residency Form

Applications will not be accepted or approved unless they are complete, signed, and include all required supporting documentation when submitted to BBEDC

Applicant Information

Name: _____ Spouse Name: _____

Mailing Address: _____ Email address: _____

_____ Cell phone: _____

Number of commercial fishermen that are listed on _____ Alternate phone: _____

the application (if none, write none or 0): _____ Intended Tax Preparer (Check one): Jerry Liboff

Bill Scheid

Dependents/Spouse on Tax Return:

- Individuals 18 or older must file their own Tax Preparation Program application.
- If married filing separate returns, **both partners** must sign the application (or submit separate Tax Preparation Program applications) and must submit separate, complete Residency and Relationship Disclosure Forms.
- If filing a joint return with a spouse, it is **strongly recommended** that the spouse also submit current Residency and Relationship Disclosure Forms.

Names of children or dependents under the age of 18 listed on this application that will file a **separate** tax return.

Name:	Age:	Name:	Age:
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Why did you apply for this program

and how will it assist you? (Required)

How did you learn about this program?

(Required)

Liaison Website BBEDC Staff Program Directory Other _____ Describe Other

My signature (below) indicates that I understand and agree to the terms of agreement as stated on the BBEDC Tax Preparation Program Applicant Acknowledgements page (attached) and indicates that the information contained in this application is true and accurate to the best of my knowledge. I acknowledge that providing false or misleading information may result in my disqualification from this and other BBEDC programs.

Signature: _____ Date: _____

Spouse Signature: _____ Date: _____

The BBEDC Tax Preparation Program Applicant Acknowledgements page contains important disclaimers regarding the execution of this agreement between BBEDC and the Applicant. This page must be included with the application packet upon delivery to BBEDC.

BBEDC Tax Preparation Program

Applicant Acknowledgements:



1. All Applicants over the age of 18 must file a Tax Preparation application, Residency Form, and Relationship Disclosure Form to be considered eligible for program benefits.
2. The BBEDC Tax Preparation Program is available to residents of the BBEDC Communities. All adult applicants are required to submit a Residency Form (with required attachments) with this application, unless a completed, approved Residency Form (with attachments) has been submitted within the last 12 months. It is the responsibility of the applicant to assure that a current Residency Form is provided or on file with BBEDC.
3. BBEDC will pay up to \$150.00 per eligible return for approved program participants while funds are available.
4. Applicants must contact the Tax Preparer him/herself- BBEDC will not contact the Tax Preparer on behalf of the applicant.
5. Tax Preparer must be a qualified preparer (according to BBEDC program requirements). It is the applicant's responsibility to assure that the Tax Preparer is among those approved by BBEDC.
6. Applicant agrees that the Tax Preparer may provide information to BBEDC including: the number of people affected/included in each tax return, the total refund (if any) from the IRS, the occupation of the individuals included in the tax return, and the total cost of preparation of the return.
7. **Client Acceptance of Services; Indemnity and Release.** Client hereby accepts the Services as provided by the Tax Preparer and confirms: (1) that he/she shall not request or accept any services under this Agreement related to taxes due for any other year, (2) that he/she resides in one of BBEDC's 17 CDQ Communities as confirmed by the submittal of a complete BBEDC Residency Form, and (3) that he/she has registered with BBEDC to participate in the Tax Preparation Program.
 - a. In accepting the Services provided under this Agreement, client agrees to indemnify, release, and hold BBEDC, its directors, officers, employees, contractors, and agents, harmless from and against any disputes which might arise from transactions performed or contemplated by this Agreement, including but not limited to tax preparation errors, audits or penalties paid as a result of such services, or any other financial or personal loss or outcome, whether known, unknown, or even contemplated by the parties at the time of the execution of this Agreement, whether through the fault of BBEDC, the Tax Preparer, or otherwise. This indemnity and release shall include costs and attorney's fees incurred by BBEDC in defending itself from any filed or threatened legal actions related to this Agreement.
8. **Client's Right to Legal Counsel.** BBEDC and Tax Preparer are not providing legal services under this Agreement. BBEDC hereby advises the client that he/she may retain legal counsel for the transactions contemplated herein. BBEDC and client agree that legal counsel may not be necessary because the transactions contemplated in the Agreement are not complex. However, in the event of a complication, the client is advised to obtain legal counsel.
9. **Client Agreement to Provide Information.** In order to facilitate BBEDC's reporting of the success of its Tax Preparation Program, BBEDC must obtain information about services provided to parties under the Program, as well as the household information for persons receiving such services, but not information about individual income or individual taxes paid. By accepting the services under this Agreement, the client agrees to the release of information related to the Services to BBEDC by the Tax Preparer for Program analysis. This information will be treated as confidential. The client's name or other information will not be released, except to the Tax Preparer during the course of providing services under this Agreement, without the client's specific permission.
10. **Miscellaneous Provisions.** This is the entire agreement between the parties. Time is of the essence in this Agreement, which shall be governed by the laws of the State of Alaska. This agreement may not be modified except by a written amendment signed by the parties nor assigned without the express written consent of the parties. Signature by counterparts or facsimile is acceptable, with original documents to follow by mail. This Agreement binds and inures to the benefit of the parties' respective heirs, representatives, and assigns.

Applicants in default of any BBEDC programs are no longer eligible to participate in other BBEDC programs or services until fully compliant.

For BBEDC Use only:

Complete; Residency Form & Attachment; Relationship Form; Card Sent; Approved on/by: _____