

This page MUST be reviewed and signed by all tax clients PRIOR to their returns being done.

Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you received additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable if needed.
- You **MUST** review the returns carefully before signing to make sure the information is correct.
- Fees must be paid before your tax returns are delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed.
- You should keep a copy of your tax return and any related tax documents. You may be assessed a fee if you request a duplicate copy in the future.

Signatures:

Taxpayer

Spouse

Date

Privacy Policy

The nature of our work requires us to collect certain nonpublic information. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to a third party without your express permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access.

Personal Information	Taxpayer Name:		SSN							
	Occupation:		Date of Birth		Are you new to our firm?					
	Address:		City		State		Zip			
	Email		Mobile phone		Home phone					
	Driver's Lic #		State		Issue date		Exp date			
	Spouse Name		SSN							
	Occupation		Date of Birth							
	Address (If different)		City		State		Zip			
	Email		Mobile phone		Home phone					
	Driver's Lic #		State		Issue date		Exp date			
	Did you move during 2023? If so please list your previous address:									
	Street		City		State		Zip			
	State(s) of residence during 2023		Rent or own home?		Total Rent					
Bank	Banking information for direct deposit of refund or direct debit of balance due									
	Bank Name		Routing #		Acct #					
Marital status	Marital Status on Dec 31, 2023		How do you wish to file? (single, married, married filing separately, head of household)							
	Were you divorced or separated during 2023?		Current status (ie: still married, living separately, awaiting court date etc)							
	Was there a death of a spouse during 2023?		Date of death							
Children/Dependents	Was a new dependent added to during 2023?		Name:		SSN#					
	Was there a death of any dependents during 2023		Name:		Date of death					
	Did any of the children/dependents have unearned income above \$1,250.00?		Name:		Amt.					
	Do any of the children have a disability?		Is it anticipated that a child will claim themselves or that a different taxpayer will seek to claim a child for 2023?							
	Names of Dependent Children		SSN#		Date of birth		Months lived in home in 2023		Relationship to taxpayer	College Student?
List any other dependents who lived with you in 2023. (ie: disabled relative/adult child, elderly dependent parent)										
Name		SSN#		Date of birth		Months lived in home in 2023		Relationship to taxpayer		Income

Questions for all Taxpayers

"You" refers to both taxpayer and spouse - ask your preparer if unsure about a question

	Yes	No	Question						
Lifestyle & Taxes			Did you receive or pay alimony in 2023?						
				<i>If yes, did you pay or receive?</i>			<i>Recipient's SSN</i>		
				<i>Date of divorce or separation:</i>			<i>Amount paid/rec'd</i>		
			Did you purchase health insurance through a public exchange/marketplace (provide form 1095-A)						
			Will there be any significant changes in income or deductions next year (such as retirement)						
			Did you purchase a new or used energy-efficient, hybrid or electric car, truck, van?						
Children/Education			Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled?						
			Do you own or have financial interest in a foreign bank or financial account?					<i>Value:</i>	
			Were any children attending college during 2023? (Provide Form 1098T & Form 1098E)						
				<i>Tuition pd by you</i>			<i>Books \$</i>	<i>Loan interest</i>	
				<i>Tuition pd by student</i>			<i>Books\$</i>	<i>Loan interest</i>	
			Did you pay for child or dependent care so you could work or go to school? (Provide statement if applicable)						
Investments				<i>Name of provider</i>			<i>EIN / SSN</i>		
				<i>Address of provider</i>					
				<i>City</i>		<i>State</i>	<i>Zip</i>		
				<i>Amount paid</i>					
			Do you have children who have unearned income of \$1,250.00 or more?						
			Did you, or will you, contribute any money to an IRA for 2023?					<i>Traditional or Roth IRA?</i>	
Deductions			Did you roll over any amounts from a retirement account in 2023?					<i>Amount</i>	
			Did you sell or transfer any stock or sell rental or investment property?						
			Did you receive or sell, exchange, or otherwise dispose of a digital asset or financial interest in a digital asset?						
			<i>Digital assets include cryptocurrencies, NFTs and stablecoins</i>						
			Did you or do you plan to, contribute money to an HSA before April 15, 2024 for 2023?						
			<i>If yes - please provide details (ie: amount, date(s) etc)</i>						
Home			Did you make charitable contributions in 2023?						<i>Amount?</i>
			<i>Be sure you have the documentation to support this in the event of an audit</i>						
			Did you purchase or sell a main home during the year? If yes provide closing statement						
			If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes provide details						
			Did you refinance a mortgage or take a home equity loan? If yes provide closing statement						
			Did you use any mortgage loan proceeds for purposes other than to buy, build or substantially improve your home?						
		Did you make any new energy-efficient improvements to your home? If yes provide details.							
Tax Preparation Checklist									
Please be sure to provide the following documentation:									
	All Form W-2 (wages), 1099 NEC (non-employee compensation), 1099-INT (interest), 1099-DIV (dividends), 1099B (proceeds from broker), 1099-R (pensions and IRA distributions), Schedule K-1 from partnerships, S corporations, estates, trusts and other reporting statements, including copies provided from the payer.								
	Form 1095-A (for health insurance purchased through a public exchange/marketplace), Form 1095-B (for health insurance purchased outside of a public exchange), or Form 1095 C (for employer provided health insurance)								
	If you are a new client, please provide copies of last year's tax returns								
	The completed Individual Income Tax Organizer. Note: if you choose not to fill out the organizer, you must at least answer the "Yes/no" questions above.								
	Copy of the closing statement if you bought, sold or refinanced real estate								
	Detail of estimated tax payments made, if any								
	Income and deductions categorized on a separate sheet for medical, taxes, interest, charitable and misc. deductions.								
	Income and deductions categorized on a separate sheet for business or rental activities								
Notes:									

Itemized Deductions Worksheet - deductions must exceed \$13,850 (MFS/single) \$27,700 MFJ/QSS

Medical Expenses. Must exceed 7.5% of income to be a benefit- include cost for dependents-do not include any expenses that were reimbursed by insurance or paid with funds from an FSA, HSA, or HRA.				Charitable Contributions.If over \$500 in noncash charitable contributions, provide details of contributions. Rules require that the taxpayer retain documentation for all contributions.						
Dentists	\$	Hospitals	\$	Monetary (cash, check, credit card)		\$				
Doctors	\$	Insurance	\$	Noncash contributions (FMV). Clothing or household items must be in good used condition or better.		\$				
Equipment	\$	Prescriptions	\$							
Eyeglasses	\$	Other	\$	Did you transfer funds from an IRA directly to a charity?		\$				
Medical miles @ .22 per mile				Yes <input type="checkbox"/> No <input type="checkbox"/>						
Taxes Paid. Do not include taxes paid for full or partial business or rental use property, including business use of the home.				Charitable mileage @ \$.14/mile						
				Casualty and Theft Losses						
State withholding			Reported on W-2	Other Deductions. The following deductions are not subject to the 2% AGI limit.						
State estimated taxes-paid in 2023			\$							
Real estate tax- residence			\$	Gambling losses		\$				
Real estate tax-other			\$							
Personal property taxes			\$	Impairment- related expenses		\$				
Property tax refund-received in 2023			\$()							
Foreign tax paid			\$	Other deductions or questions:						
Other			\$							
Other			\$							
Other			\$							
Balance paid in 2023 from prior year state returns (do not include interest or penalties)			\$	Estimated Tax Payments-Tax Year						
Did you keep receipts for sales tax paid during 2023? <input type="checkbox"/> Did you purchase a car, plane, boat, or home in 2023? <input type="checkbox"/> <i>Sales tax paid \$ Purchase paid \$ Date</i>			Installment				Date paid	Federal	State	
			First					\$	\$	
			Second					\$	\$	
			Third			\$	\$			
Interest Paid. Do not include interest paid for full or partial business-use or rental-use property, including business use of the home. Provide all Forms 1098 or lender information and ID numbers.				Fourth			\$	\$		
				Total			\$	\$		
Main home		Equity loan	\$							
Second home		Equity loan	\$							
Points		Investment interest	\$							
Notes: <ul style="list-style-type: none"> • Gambling losses are deductible only up to the amount of gambling winnings reported. A log must be kept to verify losses. • Work clothing is not deductible if adaptable for every day wear. Exception for safety equipment, such as steel-toe boots. • Expenses to enable individuals, who are physically or mentally impaired, to work are generally deductible. 										
Educator expenses. Classroom expenses of teachers, counselors, and principals. Maximum \$300 each.						\$				
Health savings account (HSA). Contributions for 2023 may be made up until April 15, 2024. (Only include contributions you made out-of pocket).						\$				
Self-employed SEP, SIMPLE, and qualified plans. Contributions for 2023 may be made up until April 15, 2024.						\$				
Self-employed health insurance. Sole proprietors, partners, and 2% S corporation shareholders if not eligible for employer coverage.						\$				
Penalty on early withdrawal of savings.						\$				
IRA deduction. For traditional IRAs. Roth IRAs are not deductible. Contributions for 2023 may be made up until April 15, 2024.						\$				
Student loan interest. Paid for taxpayers and dependents.						\$				
Moving expenses. Available only to members of the Armed Forces (or their spouses or dependents) on active duty that move pursuant to a permanent change of station assignment.						Ask preparer				
Business expenses of reservists, performing artists, and fee-based government officials.						Ask preparer				
Other adjustments. Include description.						\$				