

TAX YEAR 2023

## YOUR INFORMATION

Your Full Name

Social Security Number

Birth Date

Occupation in 2023

## SPOUSE'S INFORMATION

Spouse's Full Name

Social Security Number

Birth Date

Occupation in 2023

## ADDRESS &amp; CONTACT INFORMATION

Mailing Address

City

State

Zip

Physical Address (If different, or if Mailing Address is a P.O. Box)

City

State

Zip

Your Phone

Spouse's Phone

Your Email

Spouse's Email

## FILING STATUS

Marital status at the end of 2023

☐ Single ☐ Married

If married, did you live apart from your spouse during the last 6 months of 2023?

☐ Yes ☐ No

By answering "Yes," you are confirming that if requested by the IRS, you can provide documentation that verifies your spouse did not live with you during the last 6 months of the year, such as a lease agreement, utility bills, a letter from a clergy member, or a letter from social services.

Can you be claimed as a dependent on someone else's tax return?

☐ Yes ☐ No

Did you pay for over half the cost of keeping up your home during 2023?

☐ Yes ☐ No

Upkeep expenses include rent, utilities, food eaten in the home, mortgage interest, real estate taxes, and insurance on the home. If you use payments you received under any public assistance program to pay for part of the cost of keeping up your home, you cannot count them as money you paid. However, you must include them in the total cost of keeping up your home to figure if you paid over half the cost.

By answering "Yes," you are confirming that if requested by the IRS, you can provide documentation that verifies you paid for over half the cost of keeping up your home, such as rent receipts, utility bills, grocery receipts, and other household bills.

## DEPENDENTS

First Name	Last Name	Birth Date	Social Security Number	Relationship to You	# of Months Lived with You in 2023

If requested by the IRS, what documentation can you provide that shows evidence of the relationship between you and each of your dependents listed above (birth certificates, marriage certificates, court documents, letters from authorized placement agencies, etc.)?

If requested by the IRS, what documentation can you provide that shows evidence that each of your dependents lived with you for the number of months stated above during 2023 (school, medical, childcare provider, social service records, etc.)?

## REQUIRED INFORMATION FOR DEPENDENT CHILDREN

If you are claiming a dependent child on your tax return, in order for us to meet certain requirements set forth by the IRS, you are required to accurately and thoroughly answer all questions listed below. If applicable, be sure to provide a detailed explanation for each child you are claiming. Your tax preparer will review each question that pertains to your situation during the preparation of your tax return.

Are you claiming a child who was between 19 and 23 years of age at the end of 2023 and a full-time student for any part of five calendar months during 2023? If yes, please list the educational institution and the months attended by the child as a full-time student.

☐ Yes ☐ No

Are you claiming a child who is permanently and totally disabled? If requested by the IRS, can you provide documentation that verifies the child is permanently and totally disabled, such as a note from a doctor, healthcare provider, or social service program?

☐ Yes ☐ No

Are you claiming a child who is under age 13? If yes, please explain who provided child care while you worked?

☐ Yes ☐ No

Are you claiming a child who lived with any other adult relative for more than half the year during 2023? If yes, please list each adult relative who lived in the same home as the child for more than half the year, their relationship to the child, and their income for 2023.

☐ Yes ☐ No

Are you claiming a child who is not your own son or daughter? If yes, please explain why the parents of the child are not claiming the child.

☐ Yes ☐ No

## TAX PREPARER'S NOTES

## DURING 2023, DID YOU OR YOUR SPOUSE...

☐ Live or work in any other states? If yes, please explain.

### Receive any of the following?

- |  |  |   |
|--|--|---|
| <input type="checkbox"/> Wages or salaries         | <input type="checkbox"/> Self-employment income or a 1099-MISC       | <input type="checkbox"/> Gambling winnings          |
| <input type="checkbox"/> Unemployment compensation | <input type="checkbox"/> Pension, annuity, IRA, or retirement income | <input type="checkbox"/> Advance Premium Tax Credit |
| <input type="checkbox"/> Social Security benefits  | <input type="checkbox"/> Interest on savings or stock dividends      | <input type="checkbox"/> Other _____                |

### Make payments for any of the following?

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Daycare expenses       | <input type="checkbox"/> Charitable contributions | <input type="checkbox"/> IRA contribution                      |
| <input type="checkbox"/> Home mortgage interest | <input type="checkbox"/> Student loan interest    | <input type="checkbox"/> Health Insurance Marketplace Coverage |
| <input type="checkbox"/> Real estate taxes      | <input type="checkbox"/> College tuition          | <input type="checkbox"/> Other _____                           |

## TERMS OF ENGAGEMENT

We will prepare your Federal and State income tax returns you request using information you provide. We may ask for clarification of some items, but we will not audit or otherwise verify the information you give to us.

### YOUR RESPONSIBILITIES

It is your responsibility to provide all the information required for the preparation of complete and accurate tax returns. You should retain all documents, cancelled checks, and other data that support your reported income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for your income tax returns, and therefore, you should review them carefully before you sign them.

### OUR RESPONSIBILITIES

We are responsible for taking the information given to us by you and ensuring your tax returns are accurate to the best of our knowledge. We are also responsible for the timely electronic filing of your tax returns.

During our engagement with you, we may provide you with an estimated refund date. We do not however have any influence over the IRS or State issuing your refunds. These taxing authorities do not guarantee a specific date that a tax refund will be issued.

Your tax returns may be selected for audit by a taxing authority. In the event of a tax examination, we can arrange to assist you with any correspondence or communication that is initiated by the IRS or State.

It is our policy to keep records related to this engagement for 5 years. However, we do not keep any of your original records, so you should retain these records in secure storage. Upon the expiration of the 5 year period, we are free to destroy our records related to this engagement.

In the event of a complaint related to the services we provide, we agree to discuss the complaint, and if necessary, to take action in a good faith effort to resolve the complaint. If we make an error on your tax return, and it is discovered after the return has been filed, we will pay any initial penalties and interest that result from that mistake. However, we are not responsible for additional taxes that may be required due to an error.

All information I have given is true and correct to the best of my knowledge. I also agree to and accept the Terms of Engagement.

Your Signature

Spouse's Signature

Date