



AVOID TAX SCAMS: The IRS will never call, email or text you without first mailing you a letter

2023 Annual Engagement Letter

Taxpayer:			Please note taxes are due 4/15/24 regardless of when you file. AN EXTENSION TO FILE IS NOT AN EXTENSION TO PAY.	SSN
First	M.I.	Last		

Occupation	Date of birth	New to our firm? Yes No (if new, provide copy of 2022 return)
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Phone	Email	IP PIN _____
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Spouse:				SSN
First	M.I.	Last		

Occupation	Date of birth	New to our firm? Yes No (if new, provide copy of 2022 return)
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Phone	Email	IP PIN _____
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Address/Street

County	City	State	Zip
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If you moved during 2023, enter previous address: _____ Date of move: _____

Marital Status at 12/31/23: Single ___ Married ___ Head of Household ___ Separated ___ Widow(er) ___

Were you divorced or separated during the year? Yes No Were there any deaths in the family? Yes No

Registered Domestic Partnership (RDP) and civil unions are not considered married for federal tax purposes.

Have you received any notice from the IRS or state revenue department within the last year? Yes No

Names of dependents	SSN	IP PIN	Date of Birth	Months lived in home in 2023	Relationship to taxpayer	College Student?
Child's full name						

Did any of the children have income above \$1,100 for the year? Yes No Do any of the children have disability? Yes No

Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year 2023? Yes No

Other dependents or people who live with you

Name	SSN	IP PIN	Date of Birth	Months lived in home in 2023	Relationship to taxpayer	College student?

Bank Information

Use for:	Direct Deposit or refund	Direct debit of balance due	Name of Bank:
Checking Savings	Routing Transit Number:		Account Number:

Ask your tax preparer for information about depositing a refund into an IRA account or splitting the deposit into more than one account.

Tax Return Preparation

We will prepare your tax return based on information you provide. In the event your return is audited, you will be responsible for verifying the items reported. It is important that you review the return carefully before signing to make sure the information is correct. Unless otherwise stated, the services for preparation of your return do not include auditing, review, or any other verification or assurance. If there is a mistake and it is our fault, we will fix it at no charge.

Tax Preparation Checklist

Please provide the following documentation:

- All Forms W-2, 1099-INT, 1099-DIV, 1099-B, 1099-R, Schedules K-1 from partnerships, S corporations, estates and trusts, and other income reporting statements, including all copies provided from the payor.
- Health Insurance: Form 1095-A, Form 1095-B, or Form 1095-C.
- Copy of the closing statement if you bought or sold real estate.
- Rental property – include “Rental Tax Organizer”.
- Detail of estimated tax payments made, if any.
- Business income + expenses or loss (See Business Expense Tax Organizer).
- Itemized deductions: medical, taxes, mortgage interest, or charitable contributions.
- Business use of office in home? Include “OIH Organizer”.
- New members of household in 2023 (children, parents, dependents). Provide birth certificate and social security card.

Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive 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. In some cases, we will ask to review your documentation.
- 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.
- You must review the return carefully before signing to make sure the information is correct.
- Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required for preparation of late returns.
- You should keep a copy of your tax return and any related tax documents. You may be assessed a fee if you request a copy in the future.

Signatures. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities. This engagement is limited to the preparation and, if applicable, electronic filing of a single year return.

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, 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 to those within our firm who need to know to provide you with services. We will not disclose your personal information to a third party without your 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.

Questions – All Taxpayers

“You” refers to both taxpayer and spouse – enter “?” if unsure about a question (Provide related statements or other documentation)

Lifestyle and Taxes	Yes	No	Are either you or your spouse legally blind?		
	Yes	No	Did you pay or receive alimony?		Recipient’s SSN
			Paid	Received	\$
	Yes	No	Did you purchase health insurance through an Affordable Care Marketplace? If yes, provide Form 1095-A		
	Yes	No	Will there be any significant changes in income or deductions next year, such as retirement?		
	Yes	No	Did you purchase a new all electric or plug-in hybrid car, truck, or van? Need: Year Make Model VIN		
	Yes	No	Have you had any debt (including credit cards) cancelled? Send 1099-C		
	Yes	No	Do you own or have a financial interest in a foreign bank or financial account?		
	Yes	No	Did you make gifts to any one person in excess of \$17,000 during the year?		
	Yes	No	Did you receive any other income you have not provided information for with this organizer? If yes, explain.		
Yes	No	Would you like to allow your tax preparer or another person to discuss your return with the IRS?			

Children & Education	Yes No	Were any children born or adopted? (Provide statement for adoption expenses).	
	Yes No	Did anyone on your tax return pay college tuition? Provide 1098-T	
	Yes No	Student Loan interest? Provide 1098-E	
	Yes No	Did you pay any tuition for a private school for a dependent or take classes yourself (RESIDENTS OUTSIDE OF FLORIDA)?	
		Student	Name and Address of School
	Yes No	Did you pay for child or dependent care? (Attach required documentation)	
	Yes No	Do you have any children who earned more than \$2,200 of investment income?	
Investments	Yes No	Did you, or will you contribute any money to an IRA? (Not a 401K)	Traditional IRA Roth IRA
	Yes No	Did you roll over any amounts from a retirement account? Provide 1099-R	
	Yes No	Did you sell or transfer any stock or sell rental or investment property?	
	Yes No	Did you receive any income from an installment sale?	
	Yes No	Did you have any investments become worthless or were you a victim of investment theft?	
	Yes No	Were you granted, or did you exercise any employee stock options?	
	Yes No	Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? (Provide documentation)	
Deductions	Yes No	Did you pay any interest on a loan for a boat or RV that has living quarters? If yes, provide documentation.	
	Yes No	Did you pay sales taxes on a major purchase, such as a vehicle, boat, or home?	
	Yes No	Did you make any charitable contributions? (Cash/Non-cash amounts greater than \$250 requires receipt).	
Home	Yes No	Did you purchase or sell a main home during the year? If yes, provide closing statement.	
	Yes No	Did you refinance a mortgage or take a home equity loan? (Provide closing statement)	
	Yes No	Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve your home?	
	Yes No	Did you make any new energy-efficient improvements to your home? If yes, provide documentation.	