Byrd Accounting

IP PIN ________________ Taxpayer

IP PIN ________________ Spouse

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

2024 Annual Engagement Letter

Please note taxes are due 4/15/25 regardless of when you file.

AN EXTENSION TO FILE IS NOT AN EXTENSION TO PAY

Taxpayer: First M.I. Last		SSN#
Occupation	Date of birth	New to our firm? Yes ☐ (if new, provide copy of 2023 return) New from West Orange Tax? Yes ☐ (2023 return already on file)
Phone	Email	

Spouse: First M.I. Last		SSN#
Occupation	Date of birth	New to our firm? Yes ☐ (if new, provide copy of 2023 return) New from West Orange Tax? Yes ☐ (2023 return already on file)
Phone	Email	

Address/Street		
City	State	Zip

If you moved during 2024, enter previous address: Date of move:________________

Marital Status at 12/31/24: Single _____ Married _____ Head of Household _____ Separated _____ Widow(er) _____

Were you divorced or separated during the year? 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 tax dependents Child's full name	SSN	IP PIN	Date of Birth	Months lived in home in 2024	Relationship to taxpayer	College Student?

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 2024? Yes ☐ No ☐

Other tax dependents

Name	**SSN**	IP PIN	Date of Birth	Months lived in home in 2024	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 splitting the deposit into more than one account.

Tax Return Preparation

We will prepare your tax return based on the 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 2024 (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 the 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.

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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)

BOI	Yes ☐ No ☐	DO YOU HAVE AN LLC? (If YES, please ask us about the new Beneficial Ownership Information "BOI" filing requirements.) This is a new filing requirement the government has mandated for all LLC's and Corporations.		
Lifestyle & Taxes	Yes ☐ No ☐	Are you or your spouse legally Blind?		
	Yes ☐ No ☐	Did you pay or receive alimony? Amount?	Recipients SSN	Date of Divorce or separation
	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 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 School Name & Address	Amount Paid $
	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 your primary 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.	
EST Payments	Yes ☐ No ☐	Did you make any ESTIMATED PAYMENTS TO THE IRS? If yes, provide date and amount of payment	
		Date:	Amount: $
		Date:	Amount: $
		Date:	Amount: $
		Date:	Amount: $