REQUIRED FORM

The following information is required for income tax return preparation - bring to your appointment or include with other tax documents when dropping off or sending to us. Taxpayer, and spouse if applicable, must complete, sign and return this form before preparation of your tax return will be started.

Name ______________________________

Spouse's Name ______________________________

Tax Year 2022

For the tax year listed above I/We:

Had changes in marital status (if yes, please provide date change occurred and complete page 1 of worksheet)	◯ Yes	No ◯
Had an address change (if yes, please complete page 1 of worksheet)	◯ Yes	No ◯
Had changes in information regarding the dependents that I claim (if yes, please complete page 1 of worksheet)	◯ Yes	No ◯
Purchased health insurance coverage through Healthcare.Gov marketplace. (see our website for detailed information) **(if yes, provide form** 1095-A)	◯ Yes	No ◯
Sold my primary residence (if yes, provide copy of HUD-1 closing documents from original purchase and sale)	◯ Yes	No ◯
Sold any other property (if yes, provide copy of HUD-1 closing documents)	◯ Yes	No ◯
Had ownership Interest or authority in foreign bank or investment accounts or foreign trusts	◯ Yes	No ◯
Had major changes in sources of income (Social Security, pensions, disability payments, etc.)	◯ Yes	No ◯
Received rollovers of any retirement plan, conversions, recharacterizations or reconversions of Roth IRAs, exchanges of life insurance policies or annuity contracts. (Provide all Form 1099-R)	◯ Yes	No ◯
Had cancellation of any debt, in whole or in part, including negotiated settlements, repossessions, foreclosures, deed in lieu of foreclosure, etc (Provide all Form 1099-A and/or 1099-C)	◯ Yes	No ◯
Had income earned or originating in any state other than my resident state. (If not reported on your W-2, include details)	◯ Yes	No ◯
Received an inheritance	◯ Yes	No ◯
Received legal settlements, prizes or awards.	◯ Yes	No ◯
Made withdrawals, distributions, surrenders, etc. from any retirement, IRA, insurance or annuity accounts, or estate or trust to which I am a beneficiary. (Provide all Form 1099-R and/or K-1s)	◯ Yes	No ◯
Had resident state Consumer Use Tax due or made purchases during the tax year to which the tax applies. (see our website for detailed information)	◯ Yes	No ◯

***You must write $0 on the line to indicate you have none, if left blank we will charge an additional fee to contact you. ***

Total Amount of Purchases subject to Consumer Use Tax $ ______________

Only electronic copies of your return will be provided automatically. **If you would like a paper copy PLEASE CHECK YES** ◯ Yes No ◯

If you sold, exchanged or traded and electronic currency in 2022 you will need to provide details for each transaction. IE cost basis of currency when purchase and details from disposition.

- Current drivers license

	DL State	DL Number	DL Issue Date	DL Expiration Date
Husband or Single Filer	______	______________	______________	______________
Wife	______	______________	______________	______________

- My direct deposit bank account information for any tax refunds to be received.
  (If not completed your refund will be mailed to you - we will not use prior year's information)

Bank Name ______________________________ Type of Account Checking ☐ Savings ☐

Account Number ______________________________ Bank Routing Number ______________________________

REQUIRED FORM

I have provided you with all of the following documents and other information applicable to the preparation of this year's, or any prior year's income tax returns:

- Forms W-2, 1099-INT, 1099-DIV, 1099-B (Brokerage), 1099-MISC (Misc Income and Income from Self-employment) 1099-R (Retirement), 1099-SSA (Social Security), 1099-RRB (Railroad), 1095-A, 1095-B, or 1095-C (ObamaCare), 1099-A/1099-C (Cancellation of Debt).
- Schedule K-1's from all S-corporations, Partnerships, Estates or Trusts in which I have an income interest.
- Closing statements for any home bought or sold this year.
- Forms 1098-T, college tuition statement, and if applicable, PACT, 529 Plan, Education IRA withdrawal information.
- Notices I have received from the IRS or other taxing agency.
- Resident state Consumer Use Tax due or the amount of purchases during the tax year to which the tax applies. (see our website for detailed information)
- Current drivers license information (both spouses if joint return)
- A copy of my prior year's income tax return, if you did not prepare it.
- Gifts to anyone during the tax year totaling more than $16,000 in value.
- Details (dates & amounts) of all estimated income tax payments made this year.
- Details regarding foreign income, foreign taxes paid and ownership interests in or authority over foreign bank or financial accounts or foreign trusts.

ELECTRONIC FILING

I understand that you will electronically file my income tax return unless circumstances do not permit electronic filing. I further understand the following procedures and rules regarding the delivery, required signatures and return of required forms associated with the electronic filing process:

If electronic filing is not allowed for my return, you will inform me of the reasons and explain to me the process of filing a paper return.

Any forms requiring my signature, and my spouse's signature if filing a joint return, must be returned to you within 5 business days of the delivery of the completed returns, and no later than noon on the business day prior to the filing due date. It is my responsibilty, if my spouse is out of town, to arrange for their signature by email, fax or mail.

The signing and return of the required electronic filing forms does not dictate, alter or control the timing of my payment of any income taxes which may be due. The filing of the electronic return and the payment of any income taxes due are distinct and seperate functions. The IRS assesses separate penalties for the failure to file a return, and for the failure to pay income taxes due. The most severe of the two penalties is the failure to file penalty. I understand that your rules and procedures are in place to prevent the assessment of the failure to file penalty.

EXTENSIONS

I understand that I am responsible for the timely filing of my tax return. I further understand that if I will be delayed in filing my tax return, **it is my responsibility to request an extension and receive confirmation of my request**. I understand that receiving an extension of time to file my tax return does not extend the due date of any taxes that I may owe for the tax year extended, and that I will be charged interest and penalties on any taxes not paid by their due dates.

SIGNATURES

I understand that you will prepare my income tax returns based on the information which I have provided to you and that I am solely responsible for the substantiation of that information. I further understand that when I sign my tax return, I am declaring that I have examined the return and the accompanying schedules, statements and attachments, and to the best of my knowledge and belief, they are true, accurate and complete.

I hereby affirm that I have read and understand all of the foregoing statements and that I agree that they correctly summarize the basis of my arrangement with you for the preparation of my 2016 Income Tax returns.

Signature ______________________ Date __________

Spouse's Signature ______________________ Date __________

Privacy Policy

We collect certain personal information about you – buy only when that information is provided by you or is obtained by us with your authorization. We use that information to prepare your personal income tax returns and may also provide various tax and financial planning services to you at your request.

Parties to Whom We Disclose Information

As a general rule, we do not disclose personal information about our clients or former clients to anyone. However, to the extent permitted by law and any applicable state Code of Professional Conduct, certain nonpublic information about you may be disclosed in the following situations:

To comply with a validly issued and enforceable subpoena or summons

In the course of a review of our firm's practices under the authorization of a state or national licensing board, or as necessary to properly respond to an inquiry or complaint from such a licensing board or organization.

In conjunction with a prospective purchase, sale, or merger of all or part of our practice, provided that we take appropriate precautions (for example, through a written confidentiality agreement) so the prospective purchases or merger partner does not disclose information obtained in the course of the review.

As a part of any actual or threatened legal proceedings or alternative dispute resolution proceedings either initiated by or against us, provided we disclose only the information necessary to file, pursue or defend against the lawsuit and take reasonable precautions to ensure that the information disclosed does not become a matter of public record.

Confidentiality and Security of Nonpublic Personal Information

Except as otherwise disclosed in this notice, we restrict access to nonpublic personal information about you to employees of our firm and other parties who must use that information to provide services to you. Their right to further disclose and use the information is limited by the policies of our firm, applicable law, or Code of Professional Conduct, and nondisclosure agreements where appropriate. We also maintain physical, electronic, and procedural safeguards in compliance with applicable laws and regulations to guard your personal information from unauthorized access, alteration, or premature destruction.