New Client Questionnaire \*\* Please include a copy of your prior year's tax return and your driver's licenses\*\*

Your Name:	Date:		
• Spouse's Name (if applicable):			
• Best phone number to reach you:			
• Taxpayer DOB:	SSN		
• Spouse DOB:	SSN		
Current Address:			
Dependent Full Name	DOB	SSN	
Dependent Full Name			
Dependent Full Name	DOB		
Dependent Full Name		SSN	

ALL TAX RETURNS ARE ELECTRONICALLY FILED. Both you and your spouse (if applicable) will be required to sign the electronic filing forms.

1. Please select <u>ONE</u> option below for obtaining the required electronic filing signatures

**OPTION A: TAXDOME PORTAL:** The required signature documents for filing your tax return will be emailed to you and your spouse (if applicable) separately through Verifyle for e-signature and must be signed before the filing deadline. A copy of your tax return along with possible payment vouchers and estimated coupons will be uploaded to the TaxDome portal.

If you selected Option A: A separate and valid email address for each signer is REQUIRED

Taxpayer email:	
Spouse (if applicable) email:	

OPTION B: PAPER PACKAGE: You will be required to come into the office to pick up your tax return copy and BOTH signers will be required to sign the necessary documents for filing your tax return before the filing deadline. An electronic copy will also be uploaded to our secure TaxDome portal.

Check here if you would like us to send you a link to access our secure online TaxDome portal:

2.	If you are receiving a refund, do you want Direct Deposit? 🗌 Yes 🗌 No				
	Bank Name   Account Number     Routing Number				
	Is this a Checking or Savings? Is this a Joint Account? Yes No				
3.	Prior address if you moved in 2023 Date of Move Date of Move If you moved, we will need a copy of the Closing Disclosure Statement or HUD1 document.				
4.	. Did you have a Foreign Bank Account in 2023? Yes No				
5.	. Are you a business owner or have rental property? □ Yes □ No Do you file a separate tax return for your business or rental property? □ Yes □ No				
6.	. Did you receive a 1099-K from Venmo, Paypal, Ebay, Cashapp, etc? ☐ Yes ☐ No If you answered yes, we will need a copy of the 1099-K and an itemized list of related expenses.				
7.	DIGITAL ASSETS: At any time during 2023, did you sell, exchange or purchase any goods with crypto currency (Ex: virtual currency, nonfungible tokens (NFTs), tokenized assets, stable coins, security tokens)? Yes No If you answered yes, we need a detailed transaction list of the shares sold, free rewards received, purchases, etc.				
8.	. Did you make any federal and/or state estimated tax payments. Yes No If you answered yes, please provide individual dates/amounts of payments with your tax documents.				
Но	w did you hear about us? Please Sign Back of Form				

## **General Engagement Letter for Individual Tax Return Preparation**

This letter is to inform you, the taxpayer, of the services we will provide, and the responsibilities you have for the preparation of your tax return.

## Tax Return Preparation

- We will prepare your 2023 federal and state tax returns based on the information you provide. Services for preparation of your return do not include auditing or verification of information provided by you.
- This engagement does not include any audit or examination of your books or records. In the event your return is audited, you will be responsible for verifying the items reported.
- The tax return preparation fee does not include bookkeeping.
- Fees charges for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
- Preparation fees do cover limited assistance and consultation during the year.
- The engagement to prepare your 2023 tax returns terminates upon delivery of your completed returns and any original documents to you. Please store your supporting documents and copies of your returns in a secure place for at least seven years. In accordance with our firm's current document retention policy, we will retain our work papers and your tax returns for your engagement for four years. You may be assessed a fee if you request a copy in the future.

## 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 and 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 fee may be required for preparation of late returns.
- If you are a business owner or file a Schedule C and take a deduction for mileage you acknowledge that you have a mileage log to substantiate the business miles.

**Signatures**. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities and that you understand our responsibilities in preparing your tax returns as explained above. For a joint return, both taxpayers must sign.

Taxpayer Signature	Date	/	Print Name
Spouse Signature	Date	/	Print Name

**Privacy Policy**. The nature of our work requires us to collect certain nonpublic personal information about you from various sources. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with 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 any third party without your express written 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. Please contact us with any questions.