

Current Client Questionnaire To ensure our records are up to date, you must complete ALL fields EVERY YEAR

Your Name: _____ Date: _____

Spouse's Name (If applicable): _____

Best phone number to reach you: _____

Taxpayer email _____ Spouse email _____

Emails must not be the same

1. Please list the name of any dependents we need to remove from your return. If you do not tell us to remove a dependent, we assume the dependent(s) from the previous year are claimed again this year.

2. Please list any **NEW** dependents we need to add to your return. All fields must be completed.

Full Name _____ DOB _____ SSN _____
Full Name _____ DOB _____ SSN _____

3. NEW Address if you moved in 2025: _____

Date of Move _____ Did you purchase, sell or refinance a home in 2025? Yes No

If you answer YES, we will need a copy of the Closing Disclosure Statement or HUD1 document.

4. The IRS is no longer issuing paper checks for refunds. All refunds will be direct deposited.

Do you want us to use the same bank information from last year? Yes No

If you did not provide bank information last year or have a **NEW** bank, please provide bank information:

Bank Name _____

Account Number _____ Routing Number _____

Is this a Checking or Savings _____ Is this a Joint Account? Yes No

5. Did you have a foreign bank account in 2025? Yes No

If yes, did you have over \$10,000 in the account on any day in 2025? Yes No

6. Are you a business owner or have rental property? Yes No Please specify Business or Rental? _____

We have an organizer we can give you to help you provide us with the necessary information.

7. **DIGITAL ASSETS:** At any time during 2025, did you sell, exchange any crypto currency or purchase anything with crypto currency? Yes No

(Ex: virtual currency, nonfungible tokens (NFTs), tokenized assets, stable coins, security tokens)?

If you answer yes, we will 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 answer yes, please provide the amount and date of each payment you made with your tax documents (not just a total).

9. ***ALL TAX RETURNS WILL BE ELECTRONICALLY FILED – Please select ONE option below: ***

Both you and your spouse (if applicable) signatures will be required on the electronic filing forms

 OPTION A: TAXDOME PORTAL The required signature documents for the filing of your tax return, along with a copy of your tax return and any possible payment vouchers, will be uploaded to you and your spouse (if applicable) separately for e-signature and must be signed before the filing deadline.

****For electronic signature(s) a separate and valid email address for each signer MUST be provided.****

 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.

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 2025 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 2025 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.
- It is your responsibility to let us know if you have deductions including but not limited to tips, overtime, interest, etc.
- This engagement is limited to this tax return . Any additional returns require you to request additional engagements.
- You understand that it is your responsibility to pay any taxes due.

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 receipts and 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 all 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.
- Please verify your bank information before signing the return.

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

Spouse Signature

Date

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.