



### Contact Information

First Name \_\_\_\_\_ Last Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Cell Phone # \_\_\_\_\_ Home Phone # \_\_\_\_\_

Email Address(s) \_\_\_\_\_

Preferred Method of Communication:  Call  Text

### Tax Questionnaire

Question		Response
1.	Has your marital status changed since last year?	
2.	Any change in dependents since last year?	
3.	Any dependents enrolled in a university or trade school?	
4.	Do you have any investments in crypto currency or other digital currency?	
5.	Did you contribute to a pension plan, HSA, or education savings plan?	
6.	Has your bank account changed since last year?	
7.	Do you have any foreign bank accounts?	
8.	If you own a business, did you issue 1099s to vendors?	
9.	Have you experienced any life-changing events (i.e. got married, got divorced, moved, had a baby, changed jobs, retired, etc.)	
10.	Are you or your spouse a member of the U.S. Armed Forces?	



## Income Tax Engagement Letter

This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. We will prepare your 2024 federal and requested state(s) income tax returns from information you supply. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification. We may provide you with questionnaires and/or worksheets to guide you in gathering the necessary information.

It is your responsibility to provide all the information required for the preparation of a complete and accurate tax return. You should retain all documentation including bank statements, credit card statements, canceled checks, receipts, and other data that form the basis of income and deductions for at least 7 years. These documents may be necessary to support the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns. You should review them carefully before you sign them.

Our work in connection with the preparation of your tax returns does not include any procedures designed to discover defalcations or other irregularities, should any exist. We will use professional judgment in resolving questions where the tax laws are unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. We will consult you if any situation arises.

Fees for our tax preparation services are based upon the schedules required and the time involved to complete your tax return. As the complexity of the return increases, the fee will also likely increase. For clients with ACH authorizations on file, our fees will be drafted electronically from your bank account once the work has been completed. For clients without ACH authorizations on file, you can request one or remit payment upon receipt of your invoice. Interest will be assessed on any past due invoices.

The filing deadline for your 2024 tax return is April 15, 2025. To meet this filing deadline, all information to complete your return should be received by our office no later than March 15, 2025. If an extension of time is necessary, your request must be received by our office no later than April 10, 2025. If filing an extension, the IRS requires any tax due to be submitted by the original filing due date along with your extension. Any amounts not paid by the original filing due date may be subject to interest and penalties. Upon the successful filing of your extension, the extended due date is October 15, 2025. If an extension of time is filed, your documents must be received by our office no later than September 15, 2025. The law provides various penalties that may be imposed when taxpayers underestimate their tax liability. If you would like information on the amount or the circumstances of these penalties, please contact us.

Your returns may be selected for review by taxing authorities. Proposed adjustments by examining agencies are subject to certain rights of appeal. In the event of such an examination, we are available upon request to represent you. The scope of our audit representation services will be covered under a separate engagement letter and the fees for such services will be based upon the amount of time required at standard billing rates plus out-of-pocket expenses. We may request a retainer, and all invoices are due upon presentation.

As a taxpayer, you are ultimately responsible for ensuring that your tax returns are filed timely and accurately, even if you choose to utilize a tax preparer. We may file your tax return electronically if the documentation we require is properly executed in a timely manner and payment for our services is received.

By signing below, I hereby agree with the terms and conditions set forth within this engagement letter.

Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_ Date: \_\_\_\_\_