

## CONTACT INFORMATION

Taxpayer First Name	M.I.	Last Name	
Taxpayer Phone	Taxpayer Email		
Spouse First Name	M.I.	Last Name	
Spouse Phone	Spouse Email		
Primary residence address			Unit #
City	County	State	Zip
Current mailing address (if different)			Unit #
City	County	State	Zip

## GENERAL INFORMATION

- How would you like us to contact you about your tax return?  Phone  e-mail
- Marital Status on 12/31/2022:  Single  Married
- Yes  No Were there any changes in dependents? Explain: \_\_\_\_\_
- Yes  No Did your address change during the year? Date of move: \_\_\_\_\_
- Yes  No Did you renew your State ID/Driver's License in 2022? Provide a copy.

## INCOME AND SALES

- Please check all that apply:
 

<input type="checkbox"/> Wages / employment	<input type="checkbox"/> Self-employed / contract	<input type="checkbox"/> Sale of property	<input type="checkbox"/> Jury duty
<input type="checkbox"/> Pension / retirement	<input type="checkbox"/> 1099-K	<input type="checkbox"/> Installment sale	<input type="checkbox"/> Alimony
<input type="checkbox"/> Social Security / Disability	<input type="checkbox"/> Gig income (Uber, Lyft)	<input type="checkbox"/> Inheritance	<input type="checkbox"/> Rollover
<input type="checkbox"/> Bank interest	<input type="checkbox"/> Hobby income	<input type="checkbox"/> Foreclosure / repossession	<input type="checkbox"/> IRA Conversions
<input type="checkbox"/> Stock investments	<input type="checkbox"/> Rental property	<input type="checkbox"/> Canceled debt	<input type="checkbox"/> Backdoor Roth Conversion
<input type="checkbox"/> Employee stock options	<input type="checkbox"/> AirBnB or Room rental	<input type="checkbox"/> Prizes or awards	<input type="checkbox"/> Foreign income
<input type="checkbox"/> Unemployment income	<input type="checkbox"/> K1 Passthrough income	<input type="checkbox"/> Gambling or lottery	<input type="checkbox"/> Other income
- Yes  No Did you own any virtual currency / cryptocurrency? e.g. Bitcoin, Ethereum, Dogecoin, etc.  
Check all that apply:  Acquire / Buy  Send / Pay for services  Trade / Exchange / Sell



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## TAX RETURN PREPARATION

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We will prepare your tax return based on 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.

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## TAXPAYER RESPONSIBILITIES

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- 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 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.
- By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities.

*For a joint return, both taxpayers must sign*

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*Taxpayer Signature*

*Taxpayer Name (please print)*

*Date*

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*Spouse Signature*

*Spouse Name (please print)*

*Date*

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## PRIVACY POLICY

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*The nature of our work requires us to collect certain nonpublic information. We collect financial and personal information from applications, worksheets, reporting statements, and 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. 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 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.*