2023 Intake Questionnaire

RELIABLE TAX

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

1. How would you like us to contact you about your tax return? ☐ Phone ☐ e-mail
2. Marital Status on 12/31/2023: ☐ Single ☐ Married
3. ☐ Yes ☐ No Were there any changes in dependents? Explain: ______________________________
4. ☐ Yes ☐ No Did your address change during the year? Date of move: __________
5. ☐ Yes ☐ No Did you renew your State ID/Driver's License in 2023? Provide a copy.

INCOME AND SALES

6. Please check all that apply:

☐ Wages / employment	☐ Self-employed / contract	☐ Sale of property	☐ Jury duty
☐ Pension / retirement	☐ Farming or fishing	☐ Installment sale	☐ Alimony
☐ Social Security / Disability	☐ Gig income (Uber, Lyft)	☐ Inheritance	☐ Rollover
☐ Bank interest	☐ Hobby income	☐ Foreclosure / repossession	☐ IRA Conversions
☐ Stock investments	☐ Rental property	☐ Canceled debt	☐ Backdoor Roth Conversion
☐ Employee stock options	☐ AirBnB or Room rental	☐ Prizes or awards	☐ Foreign income
☐ Unemployment income	☐ K1 Passthrough income	☐ Gambling or lottery	☐ Other income

7. ☐ 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

DEDUCTIONS AND CREDITS

8. Please check all that apply:

- ☐ Alimony paid
- ☐ Medical expenses
- ☐ Property taxes
- ☐ College tuition
- ☐ K-12 Teacher expenses
- ☐ Mortgage interest
- ☐ Donations - items
- ☐ Childcare expenses
- ☐ Retirement contribution
- ☐ HELOC interest
- ☐ Donations - money
- ☐ OR 529 College Savings
- ☐ Student Loan Interest
- ☐ RV / Boat interest
- ☐ Volunteer miles
- ☐ Political contributions
- ☐ Health Savings Account

9. ☐ Yes ☐ No Did you purchase, sell, or refinance your principal home or second home, or did you take a home equity loan? Provide closing statement and all Forms 1098.

10. ☐ Yes ☐ No Did you acquire subsidized health insurance through the HealthCare.gov marketplace? Provide Form(s) 1095-A

11. ☐ Yes ☐ No Did you purchase a new electronic vehicle that qualifies for a tax credit?

12. ☐ Yes ☐ No Did you make energy-efficient improvements to your main home?
Check all that apply: ☐ Solar ☐ Furnace ☐ Water heater ☐ Windows ☐ Insulation

MISCELLANEOUS

13. ☐ Yes ☐ No Did you pay estimated taxes or apply an overpayment of last year's taxes to your current year's estimated tax? Provide record of amounts and dates paid to each taxing agency.

14. ☐ Yes ☐ No Do you have an account in a foreign country? e.g., bank account, securities, pension, trust, etc.

15. ☐ Yes ☐ No Are you an owner or member of a corporation or LLC? Please inquire about the new filing requirement with FinCEN.

16. ☐ Yes ☐ No Were you notified or audited by the Internal Revenue Service or a State taxing agency?Provide copies of all letters you received.

COMMENTS / QUESTIONS

2023 Engagement Letter

RELIABLE TAX

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

TAX RETURN PREPARATION

- We will prepare your 2023 Form 1040, *U.S. Individual Income Tax Return,* and applicable state tax return(s) based on information you provide. Services for preparation of your returns 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.
- Assisting you with your compliance with the Corporate Transparency Act, including beneficial owner- ship information reporting, is not within the scope of this engagement.
- The tax return preparation fee does not include bookkeeping. Additional fees apply for these services.
- Fees charged 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 original documents to you. Please store your supporting documents and your tax returns in a secure place for at least seven years.You may be assessed a fee if you request a duplicate 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 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 returns carefully before signing to make sure the information is correct.
- Fees must be paid before your tax returns are 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 may be required for late returns.

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	*Taxpayer Name (please print)*	*Date*
Spouse Signature	*Spouse Name (please print)*	*Date*

PRIVACY POLICY

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.