2025 Intake Questionnaire

RELIABLE TAX

CONTACT INFORMATION

Taxpayer First Name	M.I.	Last Name	
Taxpayer Phone	Taxpayer Email		
Taxpayer Preferred Name		Spouse Preferred Name	
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 12/31/2025: ○ 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 Oregon Department of Revenue is requesting voluntary self-identification of your race and ethnicity. Check yes if you would like to participate, or check no if you would like to opt out of the voluntary program.

INCOME AND SALES

6. Please check all that apply:

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

7. ○ Yes ○ No ○ N/A If employed, do you participate in the Oregon Saves retirement program?
8. ○ Yes ○ No Did you own any virtual currency / cryptocurrency? e.g. Bitcoin, Ethereum, Dogecoin, etc.
   Check all that apply in 2025: ☐ Acquire / Buy ☐ Send / Pay for services ☐ Trade / Exchange / Sell

DEDUCTIONS AND CREDITS

9. 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 ☐ Car loan interest (new 2025 purchase of USA-made or assembled vehicle)

10. ○ 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.
11. ○ Yes ○ No Did you acquire health insurance through the HealthCare.gov marketplace? (Do not include OHP/CHPW) Provide Form(s) 1095-A
12. ○ Yes ○ No Did you purchase a new or used electric vehicle that qualifies for a tax credit?
13. ○ Yes ○ No Did you make any high-efficiency energy improvements to your main home?
    Check all that apply: ☐ Solar ☐ Furnace/heat pump ☐ Water heater ☐ Windows/doors ☐ Insulation

MISCELLANEOUS

14. ○ Yes ○ No Do you own property in Portland other than your primary residence?
15. ○ 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.
16. ○ Yes ○ No Do you have an account in a foreign country? e.g., bank account, securities, pension, trust, etc.
17. ○ Yes ○ No ○ N/A If you have any dependents, did any of them earn income from wages, gig work, self-employment, interest, or dividends?
18. ○ 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

2025 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 2025 Form 1040, U.S. Individual Income Tax Return, and applicable state and local 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 ownership 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. Detailed consultations, calculations, and tax planning requested by you will be billed separately.
- The engagement to prepare your 2025 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, State, or local 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.

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 personal 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. Please contact us with any questions regarding our privacy policy.

IRC§7216 Disclosure & Consent

RELIABLETAX

(Required Under Internal Revenue Code §7216 and Treas. Reg. §301.7216-3)

As part of our commitment to accuracy, security, and efficient service, our office uses professional tax preparation and data-management software to prepare, research, review, electronically file, and securely store your tax return information. Federal law—specifically Internal Revenue Code §7216 and related Treasury Regulations—requires us to obtain your written consent before using or disclosing your tax return information for certain purposes, including the use of third-party software providers that assist us in preparing and maintaining your tax records.

WHAT THIS MEANS FOR YOU

Your tax return information may be accessed, processed, transmitted, or stored by trusted third-party software providers **solely for purposes related to tax preparation, tax compliance, quality review, record retention, and related professional services** that you have engaged us to perform.

These providers are contractually required to:

- Use your information only to support our tax services
- Maintain confidentiality and safeguard your data
- Comply with applicable federal and state privacy and security requirements

We **do not** sell, rent, or use your tax return information for marketing purposes, nor do we authorize third parties to do so.

YOUR CONSENT IS REQUIRED

Federal regulations require that this consent:

- Be provided separately from your engagement agreement
- Clearly describe how your information may be used
- Be signed by you before we may proceed

Please review the enclosed consent carefully, sign where indicated, and return it to our office. If you have any questions about this disclosure or how your information is protected, we are happy to discuss this with you.

Thank you for your trust in our firm. We appreciate the opportunity to serve you.

1. FEDERAL LAW REQUIREMENT

Federal law requires this consent form be signed before a tax return preparer may use or disclose a taxpayer's tax return information for purposes other than preparing, assisting in preparing, or filing a tax return, unless an exception applies.

2. PARTIES AUTHORIZED

Tax Return Preparer:
Reliable Income Tax Service Inc dba Reliable Tax, 3200 N Lombard St. Portland, OR 97217 (503) 289-4500
Third-Party Software Providers:
Professional software and technology service providers used to prepare, review, electronically file, store, back up, and manage tax return information (including cloud-based systems, secure document portals, and tax preparation platforms).

3. PURPOSE OF USE AND DISCLOSURE

Your tax return information may be used and disclosed **solely for the following purposes**:

- Preparing and electronically filing federal, state, and local tax returns
- Reviewing tax returns for accuracy and compliance
- Maintaining secure electronic records of tax returns and supporting documents
- Back-up, disaster recovery, and data-security functions
- Providing related tax compliance and professional services you have requested

No use or disclosure will be made for marketing, solicitation, or any purpose unrelated to tax preparation, review, resolution, and compliance services.

4. TYPE OF INFORMATION DISCLOSED

The information used or disclosed may include, but is not limited to:

- Names, addresses, and taxpayer identification numbers
- Income, deduction, credit, and tax liability information
- Bank account and routing numbers for authorized electronic filing or payment
- Supporting tax documents and workpapers

5. DURATION OF CONSENT

This consent is effective upon signature and remains in effect for **one year** from the date signed, unless revoked earlier in writing.

6. YOUR RIGHTS

- You are **not required** to sign this consent.
- If you do not sign, we may be unable to provide tax preparation services that rely on third-party software.
- Once your tax return information is disclosed to a third party, federal law may no longer protect it from further disclosure, although contractual and legal safeguards remain in place.

7. PROHIBITION ON REDISCLOSURE

Third parties receiving your tax return information are prohibited from using or disclosing it for any purpose other than those stated above, except as permitted by law.

CONSENT

By signing below, you authorize the use and disclosure of your tax return information as described in this document.

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

This consent complies with the requirements of ***Internal Revenue Code §7216*** *and* ***Treasury Regulation §301.7216-3****. Copies of this consent must be retained by the tax return preparer.*

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484 or by email at complaints@tigta.treas.gov.