

CLIENT INTAKE FORM

Please check all that apply:

- | | |
|--|--|
| <input type="checkbox"/> Single | <input type="checkbox"/> Head of Household |
| <input type="checkbox"/> Married Filing Joint | <input type="checkbox"/> Widowed during year
Date: _____ |
| <input type="checkbox"/> Married Filing Separate | <input type="checkbox"/> Divorced during year
Date: _____ |
| <input type="checkbox"/> I have a dependent child
not claimed elsewhere | |
| <input type="checkbox"/> I own a business | |

Taxpayer: _____ SSN/ITIN _____

- Full Time Student Blind Active Military Unemployed Occupation: _____

Date Of Birth: ___ / ___ / ____ Health ins. from the marketplace? (Y___N___)

Spouse: _____ SSN/ITIN _____

- Full Time Student Blind Active Military Unemployed Occupation: _____

Date Of Birth: ___ / ___ / ____ Health insurance from the marketplace? Y__N__

Address: _____ Apt. # : _____

City: _____ State: _____ Zip Code _____

Email Address: _____

Cell Phone:(_____) _____ Other #(_____) _____

Did you withdraw from your retirement account in 2020 & elect the 3 year reporting due to covid? (Y___ N___) (If yes we need 2020 & 21 tax return)

How did you hear about us? _____

Do you intend on filing an extension? (Y___ N___) (If so: 50\$ extension fee)



Do you pay real estate taxes? (Y___N___)
Are you paying a mortgage? (Y___N___)
Do you have bank interest? (Y___N___)
Did you invest in the stock market this year? (1099-B or 1099-DIV) (Y___N___)
Did you own or invest in any virtual currency last year? (Y___N___)
Did you cancel a debt? (1099C) (Y___N___)
Did you or anyone in your home attend college? (1098-T) (Y___N___)
Did you work as an independent contractor? (1099-NEC) (Y___N___)
Do you have a foreign bank account? (FBAR) (Y___N___)
Have you been a victim of identity theft? (PIN letter) (Y___N___)
Did you withdraw money from a pension, 401K, or 403B? (Y___N___)
Did you contribute to a retirement account? (Y___N___)
Do you owe any government agency? (Y___N___)
Did you collect unemployment? (Y___N___)
Did you make gifts of \$16,000 or more to any person? (Y___N___)
Did you have gambling winnings last year? (Y___N___)
Did you receive any letters from IRS or state agencies? (Y___N___)

Bank information

- Check (14-21 days processing time)
- Direct Deposit

Routing #: _____

Account #: _____

***I am paying for this time and expertise of a tax professional. I understand that I will be charged for the preparation of this return. I understand that my return will be prepared based on the information I provide it. I am solely responsible for the accuracy of the information above and for maintaining the records to support it.
*No Estimates - Consultations are \$125.00****

Signature: _____ **Date:** ____/____/____



ENGAGEMENT AGREEMENT

Taxpayer Name: _____ **Last 4 of SSN/ITIN:** _____

You have chosen the professionals at **S&R tax professionals** to prepare and file your tax return on ___/___/_____. In doing so, you are telling us that you have received all of your tax information (W2's 1099's etc.) and that your tax return(s) is/are ready to be filed. We will prepare your federal and state income tax returns based on the information provided to ensure accuracy in completion. We may ask you to clarify some of the information provided but will not audit or otherwise verify the data you submit.

IF you receive additional information after we file your return, this document is your official notification that you should request our services in filing the required amended return. We will be charging you an additional **FEE** for services rendered. **INITIAL HERE** _____.

ALL clients will be given one copy of their tax return. Should you need additional copies now or on a later date, we will provide them to you; however there will be a fifty (\$50.00) dollar charge per extra printed copy. **INITIAL HERE** _____.

We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied on to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will inform you of any material errors, fraud, or other illegal acts we discover.

Our fee is based on the time required at standard billing rates plus out-of-pocket expenses. Invoices are due and payable upon presentation. All accounts not paid within thirty (30) days are subject to interest charges to the extent permitted by state law.

Your preparation fee only includes the cost of preparing and filing your tax return. If you are **AUDITED**, additional services may be rendered to you for a fee. Audits conducted by the IRS and the State Taxation departments at random to prevent fraud. If you are selected for an audit and wish to be represented by our firm, we will require you to sign a Power of Attorney form and a Tax Resolution Hiring Agreement. Additional fees will be explained to you. **INITIAL HERE** _____.

This firm does not offer free quotes or estimates. If you decide to not move forward with the preparation of the tax return, a consultation fee of **One Hundred Twenty-Five (\$125.00)** dollars will be charged. **INITIAL HERE** _____.

STATEMENT OF UNDERSTANDING

I am paying for the time and expertise of a tax professional. I understand that I will be charged for the preparation of this tax return. I understand that my return will be prepared based on the information I provide. I am solely responsible for the accuracy of that information and for maintaining the records to support it.

Taxpayer Signature: _____ **Date** _____
Spouse Signature: _____ **Date** _____

