Individual Taxpayer Organizer

Taxpayer Name *First*	*M.I.*	*Last*	SSN
Email			IP PIN
Occupation	Date of birth		Are you new to our firm?
Address	City	State	Zip
County	Home phone		Work or cell

Please provide copy of State issued ID, Front and Back

Spouse Name *First*	*M.I.*	*Last*	SSN
Email			IP PIN
Occupation	Date of birth		Are you new to our firm?
Address *(If different from Taxpayer)*	City	State	Zip
County	Home phone		Work or cell

Please provide copy of State issued ID, Front and Back

Marital status at 12/31 : ☐ Single ☐ Married ☐ Separated ☐ Widow(er)

Were you divorced or separated during the year? ☐ Yes ☐ No

Were there any deaths in the family? ☐ Yes ☐ No

Have you received any notice from the IRS or state revenue department within the past year? ☐ Yes ☐ No

Names of dependent children *Child's full name*	*Social Security #*	*IP PIN*	*Date of birth*	*Months lived in home in the year?*	*Relationship to taxpayer*	*College student?*

Did any of the children have income above $1,100 for the year? ☐ Yes ☐ No

Do any of the children have a disability? ☐ Yes ☐ No

Is it anticipated that a different taxpayer will seek to claim a child listed above as their dependent for tax year ? ☐ Yes ☐ No

Other dependents or people who lived with you

Name	*Social Security #*	*IP PIN*	*Date of birth*	*Months lived in home in 2021*	*Relationship*	*Income*

Bank information: Use for Direct deposit of refund Direct debit of balance due *Name of bank*

Checking ☐	*Savings* ☐	*Routing transit number*	*Account number*

Questions — All Taxpayers

(Provide related statements or other documentation.)

"You" refers to both taxpayer and spouse — enter "?" if unsure about a question.

	Yes	No			
LIFESTYLE & TAXES			Are either you or your spouse legally blind?		
			Did you pay or receive alimony? *Paid or Received* $	*Recipient's SSN*	*Date of divorce or separation*
			Did you have health insurance for you, your spouse, and all dependents for the entire year?		
			Did you purchase health insurance through a public exchange?		
			Will there be any significant changes in income or deductions next year, such as retirement?		
			Did you purchase a new energy-efficient car, truck, or van?		
			Are you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards)		
			Are you a member of the military?		
			Were you a citizen of or lived in a foreign country?		
CHILDREN & EDUCATION			Were any children born or adopted in the year? *(Provide statement for other expenses.)*		
			Were any children attending college?	IF YES 1098-T needed from college	Years completed in college? _______________
			Did you pay any tuition for a private school for a dependent or take classes yourself?		
			Student		*Amount paid* $
			Name of school		
			Did you pay for child or dependent care so you could work or go to school? *(add statement if needed)*		
			Name of provider		*EIN or SSN*
			Address		*Amount paid* $
			Did you make any contributions to a 529 plan in the year?		
INVESTMENTS			Did you, or will you, contribute any money to an IRA for the year?		Traditional IRA Roth IRA
			Did you roll over any amounts from a retirement account in the year?		
			Did you sell or transfer any stock or sell rental or investment property? Or receive any money from an installment sale?		
			Did you receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?		
DEDUCTIONS			Did you pay any interest on a loan for a boat or RV that has living quarters? If yes, provide details.		
			Did you pay sales taxes on a major purchase, such as a vehicle, boat, or home?		
			Did you make any charitable contributions in the year?		
BUSINESS			Did you work from a home office or use your car for business?		
			Did you receive income from a sharing/gig economy activity (e.g. Airbnb, Uber, etc.)		
			Do you own have income from a business, rental, or farming operation?		
HOME			Did you purchase or sell a main home during the year? If yes, provide closing statement.		
			If you sold a home, did you claim the First-Time Homebuyer Credit when it was purchased? If yes, provide details.		
			Did you refinance a mortgage or take a home equity loan? (Provide closing statement)		
			Did you use any mortgage loan proceeds for purposes other than to buy, build, or substantially improve		
			Did you make any new energy-efficient improvements to your home? If yes, provide details.		
MISC			Did you receive a 1099-B from Investments?		
			Did you receive a 1099-G for Unemployment?		
			Did you receive a W-2G for Gambling winnings?		

State information Full-year resident ☐ Part-year resident ☐ Nonresident States of residence during 2023 and dates

School district Do you rent or own your home? ☐ Rent ☐ Own

Estimated Tax Payments if paid

Installment	*Date paid*	*Federal*	*Date paid*	*State*
First		$		$
Second		$		$
Third		$		$
Fourth		$		$

Additional Information:

Amos Income Tax Service Letter of Engagement and Privacy Policy

This letter outlines the terms, nature, and scope of our tax preparation services. We will prepare your entity or individual income tax returns using the source documents you provide. We will question information that is not evidenced. We will not include deductions that are not supportable. It is not our duty to audit or verify documentation. We provide a paper or electronic copy of your returns for your files. We verify new Social Security numbers on tax returns. If all information is not provided by February 28th(business)/March 31st(personal), an extension allowing us an additional 6 months to prepare is required. Taxpayers must pay taxes due by March 15th/April 15th (excluding weekends or holidays) even if on extension. If you claim a deduction, keep all substantiating proof and documents, producing them in event of an audit. Keep all records in a secure location. Ask us what is required to prove income or a deduction. We exercise due diligence in interpreting tax law and regulations. We keep electronic copies of all returns and supporting documents for 3 years from the due date. Copies of your return may be provided to the signatory parties on the return ONLY, for a fee. Your signature(s) on the returns, or e-file authorizations, confirm(s) you examined the returns, statements, and schedules, and that they are true, correct, and complete, to the best of your knowledge and belief. Our fees are based upon the complexity of the returns, and the time taken for completion. Bookkeeping fees may be billed if we must put records into a usable form. Payment for services is due upon completion and before electronic filing of any return, barring other agreements. If you require multiple-year preparation, we require a 50% retainer of our estimated fees. We accept cash, checks, and credit cards. Amended tax returns, resulting from your omission of income, deductions, or material facts, will be billed separately. Cards are subject to a 3% card processing convenience fee.

If you supplied all relevant information, we refund penalties resulting from preparation error of our firm after submitting penalty abatement letters, paying the penalty only after abatement is denied. We do not reimburse tax liability due. We electronically file all returns as allowed by taxing authorities. We do not charge for simple routine consultations throughout the year unless additional research and filings are required. However, if you fail to return as a client, we will bill for all consultations at our standard hourly rate, currently $100. Your returns are subject to review by the taxing authorities. Inform us immediately of any letters received from the IRS or other taxing authority. Issues can be resolved quickly and simply if prompt action is taken. We may ask you to sign a power of attorney to allow us to correspond with, or speak to, revenue officers regarding your issue. If audited or examined, we can represent you at our standard hourly rate. A separate letter of engagement will be issued for that engagement. We maintain physical, electronic, and procedural safeguards that comply with federal and state regulations to guard your non-public personal information, as required by law. We handle the information you provide with confidentiality and care. We restrict access to your information to members of our staff who must have the information to complete your tax work. We will not disclose your information to anyone outside our company unless enforced by legal action. We will not provide your information to any third party even upon your request. We will only provide information to the signatory parties listed on the return after verification of identity. We can provide a copy through a secure server, by mail, in person, but not by unsecured facsimile. A copy of your taxpayer bill of rights is supplied to you in your client portal as well available in office.

CANCELATION POLICY

When our office books your appointment, we are setting a dedicated chair and time slot just for you. We will confirm your appointment by email, text, or phone, multiple times before your appointment. You must notify us no less than 24 hours in advance of your scheduled appointment. This provides the courtesy to make it possible for us to fill your time slot with another client. Rescheduling or canceling an appointment less than24 hour notice will be subject to the following rates:

No call no show: $50

Reschedule/cancel within 24 hours: $25

By signing this contract you are affirming that you have read and agree to the terms of service with Amo's Income Tax Service.

Taxpayer Signature | Spouse Signature | Date