

Drop Off Sheet 2024

Date Dropped off: _____

Date of appointment (if applicable): _____

Did we file your 2023 tax return? YES NO If not, please provide copy of most recently filed tax return

Client name(s): _____ DOB: 1) _____ 2) _____

Did your address change last year? NO YES: If YES please provide new address:

Preferred means of communication: Phone or email? _____

Phone number: _____

Email address: _____

Did your license expire last year? NO If yes, or new client: please provide a photocopy of the front and back

Direct Deposit: Same Account: New Account: Opt-out / Prefer checks mailed

Name of bank: _____

Routing #: _____ Acct#: _____ Checking Savings

Please provide answer and check yes or no	Y	N
Did your marital status change? Marriage <input type="checkbox"/> Divorce <input type="checkbox"/> Separation <input type="checkbox"/>		
Any change of dependents? (space provided on back)		
Any financial interest or signature authority in a foreign bank account or own property in a foreign country? Please provide documentation.		
Did you own/sell/exchange Bitcoin or Crypto currencies? If so, please provide year end documentation.		
Did you purchase or sell a home? If so, please provide Settlement or Disclosure Statement.		
Did you receive unemployment benefits? If so, please provide 1099-G from NYS Department of Labor website.		
Did you receive any distributions from a retirement account or 401K? If so, please provide a 1099-R.		
Did you make any charitable donations? How much? \$ _____ If greater than \$250 please provide documentation/proof.		
Do you have any job-related expenses that were not reimbursed by your employer? (union dues, uniforms, mileage etc.) Amount? \$ _____ Please provide documentation/proof.		
Did you pay education expenses? If so, please provide form 1098-T from the institution.		
Did you make any Energy Efficient improvements? Please provide itemized receipts (windows, doors, insulation, heating/cooling etc.).		
Did you receive Health insurance through NYS State Marketplace? If so, please provide 1095-A.		

How would you like to receive your completed return? Printed Emailed

Please note, if you do not choose, we will automatically prepare the return for email.

If an additional copy, either printed or electronic is requested, there will be an

additional \$25.00 fee

(PLEASE SEE BACK)

Ruso & Company LLC

156 BROADWAY

Rensselaer, NY 12144

TERRY@TMRUSO.COM

Phone: (518)438-0203 | Fax: (518)446-9688

Your privacy is important to us. Read the following privacy policy.

We collect nonpublic personal information about you from various sources, including:

- * Interviews regarding your tax situation
- * Applications, organizers, or other documents that supply such information as your name, address, telephone number, Social Security Number, number of dependents, income, and other tax-related data
- * Tax-related documents you provide that are required for processing tax returns, such as Forms W-2, 1099R, 1099-INT and 1099-DIV, and stock transactions

We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as requested by our clients or as required by law.

We restrict access to personal information concerning you, except to our employees who need such information in order to provide products or services to you. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your personal information.

If you have any questions about our privacy policy, contact our office at (518)438-0203.

Sincerely,

Terance M Ruso CPA
Ruso & Company LLC

Ruso & Company LLC

156 BROADWAY
Rensselaer, NY 12144
TERRY@TMRUSO.COM
Phone: (518)438-0203 | Fax: (518)446-9688

Subject: Preparation of Your 2024 Tax Returns

Thank you for choosing Ruso & Company LLC to assist you with your 2024 taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your 2024 federal and state income tax returns. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. An Organizer is enclosed to help you collect the data required for your return. The Organizer will help you avoid overlooking important information. By using it, you will contribute to the efficient preparation of your returns and help minimize the cost of our services.

In the letter below, you will find the terms, nature, and extent of the services to be provided, and you will be asked to confirm your understanding of any mutual responsibilities.

Please read the letter below and **sign**, so we can begin working on your return.

Important Deadlines

April 1, 2025 — Deadline to submit your tax information to Ruso & Company, LLC

April 15, 2025— Deadline to pay and file tax returns or extensions.

If the information is received after April 1st, 2025 there is *no assurance* that the return will be completed by the April 15th deadline. In addition, you may be subject to additional fees based on any additional needs.

Your federal and/or state income tax returns will be prepared with the information you provide. You will provide Ruso & Company, LLC with complete and accurate information up front. Ruso & Company, LLC will keep the information you provide confidential. Services will be provided only as needed to prepare your tax return(s). Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon 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.

You are responsible for reporting any foreign activities upon signature. By signing this letter, you acknowledge that you will inform us of any income from foreign sources or if you have signatory authority over any foreign financial accounts. If you are still determining whether income/accounts are foreign, please disclose this regardless so we can review it. Failure to report these types of activities will result in severe penalties.

You will be responsible for providing all necessary documentation required by law to support your data. This includes expenses for gifts, travel, vehicle use, meals, charitable contributions, and so forth. If you need clarification on what documentation is required at any given time, please reach out to discuss further. Professional judgment will be used to resolve issues when tax law is unclear or when there is conflict among authorities. But ultimately, you, the taxpayer, have the final responsibility for your tax return(s). Therefore, it's imperative that you carefully review all documents before signing and filing them.

Ruso & Company, LLC may also provide a checklist for you to complete up front, which will ensure we collect your most up-to-date information. Completion is optional, but it can help remind you what items are needed. Nonetheless, upon signature, please provide originals or copies of originals for all government tax documents (W-2s, 1099s, 1098s, and property tax statements). All records will be returned to you after we've finished serving you. We recommend you store them securely, as well as supporting documents, in case they are needed later in the tax preparation process. Ruso & Company, LLC will retain copies of all tax returns for 7 years, after which these documents will be securely disposed of and destroyed.

Please remember that if we are preparing a joint return for you and your spouse, tax returns and copies of all supporting documents will be made available to both spouses without the other spouse's consent or notification.

If additional time to file is needed, your provided information will be used to prepare the extension. Please remember that to prepare a valid and accurate extension, we will need as much information as possible. You will also need to expressly approve filing an extension before this can be done on your behalf. As a reminder, an extension only provides you with additional time to file, not to pay. Taxes paid after April 15, 2025 will result in late fees and interest by taxing authorities.

Tax preparation fees will be charged based on the complexity of work. Should any complications arise as your tax return(s) are being prepared, fees may be adjusted accordingly. Invoices are due and payable at the time when you sign your E-File authorization to file the return. You will receive a copy of your tax return in either physical or digital format, as agreed upon between the firm and the client.

Should the IRS or state tax authorities audit your return, please let us know immediately (as soon as letters are received from the IRS/any other tax agency), so we can react accordingly and be available to assist you. If Ruso & Company, LLC is at fault, your return will be amended or corrected for free, and Ruso & Company, LLC will pay any applicable penalties. If Ruso & Company, LLC is not at fault, you will be responsible for any taxes owed, in addition to any fees to us for correction.

This agreement will conclude at the time completed returns are delivered to you (paper-filing), or upon signature and submission of your tax return(s) (e-filing).

To agree to this letter and its summary of our arrangement, please sign below and return it in person or electronically. Work will not begin until a signed copy of this engagement agreement is returned. Should you be filing a joint return,

both spouses are required to sign.

Thank you for putting your trust in Ruso & Company, LLC Please do not hesitate to reach out if you have any questions or concerns.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, sign the enclosed copy of this letter in the space indicated and return it to us in the envelope provided.

Thank you for the opportunity to be of service. If you have any questions, contact our office at (518)438-0203.

Sincerely,

Terance M Ruso CPA
Ruso & Company LLC

(Both spouses must sign for preparation of joint returns.)

Accepted By:

Taxpayer

Spouse

Date