

Creekside Income Tax LLC
2025 Tax Review Form
2151 Hess Rd. Appleton, NY 14008
716-778-5120
2025

Complete the form below and sign the engagement letter (both spouses) Taxes will not be started until forms have been completed and signed and return to us with all tax documents. You can print and drop off the completed form with your documents to one of our drop boxes or bring to your appointment.

Name (Lastname, First):

Date:

☐ **If you or your spouse renewed their driver's license since you were her last year, include a copy of both sides of the driver's license (Must be received before taxes can be started)**

☐ **Signed and dated Letter of Engagement (Must be signed and dated by taxpayer & spouse before taxes can be started)**

Personal Information Update any changes

Names:

Taxpayer

Spouse:

Occupation:

Email Address

Phone

Address:

Bank Name (for direct deposit or debit)

☐ **Checking**

Account #:

☐ **Savings**

Routing #:

New for 2025: Refund will be delayed if you are requesting a paper check.

Marital Status: ☐ **Single** ☐ **Married Filing Joint** ☐ **Married Filing Separate** ☐ **Head of Household**

Dependents: - Any changes? ☐ **None** **If new dependent, enclose a copy of birth certificate and social security card**

Did your dependents live with you for the full year and you provided their support?

☐ **Yes**

☐ **No, Explain**

If your dependent is a college student, enclose college tuition statement(1098T). Enclosed ☐ **Yes** ☐ **No**

Tax Paperwork Verification Use the client checklist you received by mail/email to verify your documents necessary to complete your tax return. The checklist is based on the documents used to prepare your tax return last year.

List new documents, and explain? ☐ None

List documents not needed for this year, and explain why no longer needed?

Overtime: If you worked overtime, please include last paystub of the year. The W-2 may not include the information needed to determine overtime amounts.

General Questions

1. Did you (or your spouse) collect unemployment? ☐ No
☐ Yes, include the NYS Form 1099-G. NYS does not mail; you must print or download.
2. Do you (or your spouse) have long term care insurance (special nursing home care)? ☐ No
☐ Yes, include amount paid for Taxpayer & Spouse individually. _____
3. At any time during 2025, did you (or your spouse) have anything to do with virtual currency (such as bit coin)?
☐ No ☐ Yes, include transactions paperwork
4. Did you (or your spouse) purchase anything without paying the NY State tax due? ☐ No
☐ Yes, how much did you spend?
5. Do you (or your spouse) have a foreign bank account? ☐ No ☐ Yes, what country
6. Did you (or your spouse) purchase a new 2024 or 2025 car? ☐ No ☐ Yes, include total tax paid and VIN
7. Did you receive a NYS inflation refund check (they came Sept/Oct 2025)? ☐ No ☐ Yes, how much _____
8. If you have a Health Saving Account, do you have **single** or **family** coverage? High deductible? ☐ No ☐ Yes
9. Are you (or your spouse) an active volunteer fireman or EMT for the full year? ☐ No
☐ Yes, Company Name

If yes, have you been convicted of *Bribery Involving Public Servants and Related Offenses, Corrupting the Government, or Defrauding the Government*? ☐ Yes ☐ No

Any questions? ☐ No

☐ Yes

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General Engagement Letter for Individual Tax Return Preparation

This letter is to inform you, the taxpayer(s), of the services we will provide you, and the responsibilities you have for preparation of your tax return. This engagement letter is required before we begin preparation of your income taxes.

Tax Return Preparation

- We will prepare your 2025 Form 1040, U.S. Individual Income Tax Return, and applicable state tax return based on information you provide. Services for preparation of your return 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.
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
- The charges for our services are based on our fee schedule and the complexity of the returns.
- 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 copies of your tax returns in a secure place for at least seven years. You may be assessed a fee if you request a 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 may 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.
- You must review the return carefully before signing to make sure the information is correct. You have the final responsibility for your income tax returns.
- Fees must be paid before your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed.

Signatures. 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

Date

Spouse

Date

Creekside Income Tax

Date

Data Privacy Policy. We have 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 any third party without your express 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.