

## 2025 Tax Preparation Consent & Agreement

Date: \_\_\_\_\_ Client Name(s): \_\_\_\_\_

Email: \_\_\_\_\_ Phone #: \_\_\_\_\_

Resler's Tax Service, Inc. is pleased to confirm our understanding of the arrangements for your individual Form 1040 income tax return(s). This letter confirms the services you have asked our firm to perform and the terms under which we have agreed to do that work. Please read this letter carefully because it is important to both our firm and you that you understand what you can and cannot expect from our work. In other words, we want you to know the limitations of the services you have asked us to perform. If you are confused at all by this letter or believe we have misunderstood what you need, please call us before you sign it.

This engagement letter represents the entire agreement regarding the services described herein and supersedes all prior negotiations, proposals, representations, or agreements, written or oral, regarding these services. It shall be binding on the heirs, successors, and assigns of you and us. The Internal Revenue Service imposes penalties on taxpayers, and on us as return preparers, for failure to observe due care in reporting for income tax returns. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom we prepare tax returns to confirm the following arrangements. We will prepare the returns from information that you will furnish to us. It is your responsibility to provide all the information required for the preparation of complete and accurate returns. Your use of such forms will assist us in keeping our fee to a minimum. To the extent we render any accounting and/or bookkeeping assistance, including (but not limited to) telephone calls, letters, emails, and 3rd party consultations, it will be limited to those tasks we deem necessary for preparation of the returns and will be billed at our standard billing rates and minimums.

Resler's Tax Service, Inc. will prepare your 2025 Federal and State Income Tax Form 1040 returns, including related schedules, based on the information you provide. This includes federal tax returns and specific state(s) and/or counties as applicable. Please indicate any **additional states and/or counties outside of Indiana** that require filing:

\_\_\_\_\_.

We will not in any way verify the data you submit, although we may ask you to clarify some of the information. We are not responsible for returns prepared by other preparers.

By signing, I acknowledge that I have reported all 2025 income received, including barter, cryptocurrency, consumer-to-consumer activity, cash-based revenues, and all other income, whether received in-person, in-kind, or electronically. This also includes any foreign income or financial statements you have received. I confirm that I have or will timely file any applicable required Forms W-2 and W-3 with the Social Security Administration and IRS for business employees or home-workers.

By signing, I acknowledge that Resler's Tax Service, Inc. will provide me with all of my information and tax documents upon completion of my tax return(s). A request for duplicate tax returns or supporting documents (e.g., W-2's, 1099's, etc.) is subject to billing. Requests for duplicate returns and/or documents during holidays will be subject to increased billing.

It is your responsibility to maintain, in your records, the documentation necessary to support the data used in preparing your tax returns and the required documents to support charitable contributions for three years from the filing date. It is also your responsibility to carefully examine and approve your completed tax returns before signing and mailing them to the tax authorities. We are not responsible for the disallowance of doubtful deductions or inadequately supported documentation, nor for resulting taxes, penalties, and interest. We will rely, without further verification, upon information you provide to us from 3rd parties, including (but not limited to) K1's, 1099's, 1098's, receipts, and similar items.

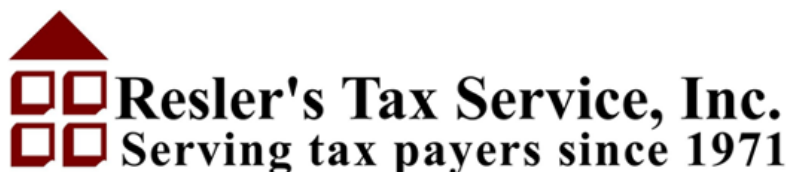
We DO NOT automatically file tax extensions for clients—you must notify us in writing, email, or fax if you wish us to file an extension. The notification should include your estimate of any balance due with the extension. We must receive your information by April 1 in order to complete your return in a timely manner. Information received after that date may cause your return to be extended and completed after the April 15 due date. Failure to file an extension may make you subject to various penalties and interest. Additionally, if your return is extended, it does not relieve you from paying any tax due on the due date or making quarterly estimated tax payments for the current year. Failure to pay any tax due with the extension or failure to pay quarterly estimated tax payments may make you subject to various penalties and interest.

Resler's Tax Service, Inc. appreciates the opportunity to serve you. Please date and sign the enclosed copy of this letter to acknowledge your agreement with and acceptance of your responsibilities and the terms of this engagement. It is our policy to initiate services after we receive the executed engagement letter. If any provision of this agreement is declared invalid or unenforceable, no other provision of this agreement is affected, and all other provisions remain in full force and effect.

I (we) have read the above terms of the engagement letter and agree with the terms of this engagement.

**Client Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

Name of Authorized Signer (if not the taxpayer): \_\_\_\_\_



## Client Identity & E-File Verification

Do you (or your spouse/dependents) have an IRS Identity Protection PIN?  Yes  No

If YES, provide the name and 6-digit IP PIN(s).

Name: \_\_\_\_\_ PIN: \_\_\_\_\_

Name: \_\_\_\_\_ PIN: \_\_\_\_\_

Was an Identity Protection PIN issued due to **identity theft** or **voluntary enrollment**? (CIRCLE)

---

## Common Credits & Deductions

Solar panels, battery storage, geothermal, or wind energy?  Yes  No

New windows, doors, insulation, HVAC, or heat pump upgrades?  Yes  No  
(If yes, provide the amount paid.) \$ \_\_\_\_\_ AHRI Number: \_\_\_\_\_

Mortgage interest paid?  Yes  No (If yes, provide the 1098.)

Property taxes paid?  Yes  No (If yes, what county?) \_\_\_\_\_

Child or dependent care expenses  Yes  No

College tuition, education expenses, or tuition loan interest?  Yes  No  
(If yes, provide the 1098-T, 1098-E, or itemized list / receipts.)

Electric vehicle (new or used) purchase  Yes  No

New vehicle financed after 12/31/2024 (personal use)  Yes  No

HSA contributions  Yes  No (If yes, provide the 1099-SA.)

Self-employment or side income  Yes  No

Donations (cash or non-cash)  Yes  No  
(If yes, provide an itemized list / receipts.)

Did you contribute to an Indiana CollegeChoice 529 plan?  Yes  No  
(If yes, provide the account numbers and amounts contributed.)

Are you an educator who paid out-of-pocket for classroom supplies?  Yes  No  
(If yes, provide the amount paid.) \$ \_\_\_\_\_