

# SPRINGFIELD

BOOKKEEPING & TAX SERVICES



4466 Elvis Presley Blvd Ste 142  
Memphis TN 38116  
Office 91-672-7814 Cell 901-488-4656  
www.springfieldtaxes.com

## Letter Of Engagement

2022 Tax Year

The Undersign person(s) has authorized **Springfield Bookkeeping & Tax Services** representative(s) to prepare their federal/state(s) tax return(s). **Springfield Bookkeeping & Tax Services** claims no responsibilities for tax return(s) other than preparing the return(s), the accuracy of the return(s) will be related to the information that the taxpayer provided. Information received by **Springfield Bookkeeping & Tax Services** will be use in accordance with the rules and regulations of the Internal Revenue Services.

**Springfield Bookkeeping & Tax Services** makes no guarantee to the time frame of Tax refunds deposited. All dates are at best estimated times, but not guaranteed. Please allow 21 business days from the date the IRS Acknowledges your tax return before contracting my office or the IRS.

If payment is not electrically paid from your federal tax return(s) the taxpayer(s) is responsible for any unpaid balance, it is your responsibility to pay the preparation fee. This include if the IRS takes your refund. If using direct deposit and fees are not paid, **Springfield Bookkeeping & Tax Services** may use Auto Collect to collect past due preparation fees from your account.

By signing this letter of engagement to have your return(s) prepared, you have authorized **Springfield Bookkeeping & Tax Services** to prepare your tax return(s) and to fully offset the services rendered.

Taxpayer Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Taxpayer Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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## 2022 Tax Season Intake Form

Name: \_\_\_\_\_ SS# \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

DOB: \_\_\_\_\_ Occupation: \_\_\_\_\_

Home Phone#: \_\_\_\_\_ Cell Phone# \_\_\_\_\_ Carrier: \_\_\_\_\_

Email-address: \_\_\_\_\_

Spouse Name: \_\_\_\_\_ SS# \_\_\_\_\_

DOB: \_\_\_\_\_ Occupation: \_\_\_\_\_

### Dependents:

Name: \_\_\_\_\_ SS# \_\_\_\_\_

DOB: \_\_\_\_\_ Relationship: \_\_\_\_\_

Name: \_\_\_\_\_ SS# \_\_\_\_\_

DOB: \_\_\_\_\_ Relationship: \_\_\_\_\_

Name: \_\_\_\_\_ SS# \_\_\_\_\_

DOB: \_\_\_\_\_ Relationship: \_\_\_\_\_

1. Did your dependent(s) live with you in 2022? \_\_\_\_\_ How many months? \_\_\_\_\_
2. Are you claiming the same dependent(s) as last year? \_\_\_\_\_
3. If grandchild(ren) please provide the following info
  - a. Parent(s) name: \_\_\_\_\_
  - b. Address: \_\_\_\_\_

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4. Did the parent(s) contribute to the care of the child(ren)
5. Do you have birth cert(s) and social security card(s) for the dependents? \_\_\_\_\_
6. Have you ever been denied the Earned Income Credit? \_\_\_\_\_ If yes when: \_\_\_\_\_
7. Did you pay childcare services so that you could work? \_\_\_\_\_
8. What type of public assistant did you received? Please circle all that applies: Food Stamps, Housing Assistant, Welfare, Child Care Assistant

By signing this form, you agree that all information provided is true according to the due delinquency form 8867 pertaining to the earned Income Credit Check List.

Taxpayer Signature: \_\_\_\_\_

Taxpayer Signature: \_\_\_\_\_

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## 2022 Tax Check List

1. How many jobs did you have in 2022? \_\_\_\_\_
2. Were you self-employed in 2022? \_\_\_\_\_
3. Did you receive unemployment in 2022? \_\_\_\_\_
4. Did you receive Social Security in 2022? \_\_\_\_\_
5. Did you receive Disability in 2022? \_\_\_\_\_ (If yes you should not be filing a tax return)
6. Did You Receive Interest Income in 2022? \_\_\_\_\_
7. Did you Receive any type of lawsuit settlement in 2022? \_\_\_\_\_
8. Did you pull any money out of your retirement account in 2022? \_\_\_\_\_
9. Did you receive any W2G(s) from any gaming establishment in 2022? \_\_\_\_\_
10. Where you, your spouse or child(ren) in college in 2022? \_\_\_\_\_
11. Are you purchasing your home? \_\_\_\_\_
12. Did your home foreclose in 2022? \_\_\_\_\_
13. Did you get forgiveness of any credit card(s) or auto debt in 2022? \_\_\_\_\_
14. Did you or anyone on your tax return have insurance thought the Marketplace? \_\_\_\_\_
15. Did you purchase an Electric Vehicle in 2022? \_\_\_\_\_
16. Were you disallowed EIC in a prior year? \_\_\_\_\_
17. Do you have a debt with the IRS? \_\_\_\_\_
18. Do you have an outstanding Student Loan? \_\_\_\_\_
19. Do you owe back child support? \_\_\_\_\_
20. Would you like to apply for the fast cash advance up to \$7,000.00? \_\_\_\_\_ (we can't guarantee you will qualify for this advance)
21. Would you like your refund put on a (pre-paid card, check from my office, Direct Deposit (VOID CHECK NEEDED)

Taxpayer Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Taxpayer Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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## 2022 Tax Season Self Employed Check List

1. When did you start the business? \_\_\_\_\_
2. Do you have an EIN? \_\_\_\_\_ If yes provide number \_\_\_\_\_
3. Do you have a business license? \_\_\_\_\_ If Yes, Is it current? \_\_\_\_\_
4. Do you have a separated business bank account? \_\_\_\_\_
5. What type of service(s) do you provide? \_\_\_\_\_
6. Will you be preparing 1099's? \_\_\_\_\_
7. Did you keep records to show business income and expenses? \_\_\_\_\_

Business Income \_\_\_\_\_

Business Expenses:

Supplies _____	Travel/meals/ent _____	Legal/Prof Svs _____
Rent _____	Advertising _____	Internet _____
Postage _____	Office Exp _____	Phone: _____
Labor _____	Utilities _____	Permits/License _____
Gas _____	Repair & Main. _____	

By signing below, I certify that I am self-employed, and that the information given above is true and accurate to the best of my knowledge.

Taxpayer Signature: \_\_\_\_\_

Taxpayer Signature: \_\_\_\_\_