**Walrath Tax Service LLC -Updated information 2024**

**For Students (AGE 14-23)**

**Client Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Name you go by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Mailing Address\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_City\_\_\_\_\_\_\_\_\_\_\_\_\_State\_\_\_\_Zip\_\_\_\_\_\_\_\_\_**

**Physical address(If Different from above) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**(County)\_\_\_\_\_\_\_\_(School District) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Phone #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Best Email address to use \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**~Are you being claimed, by parent or guardian? \_\_\_\_\_\_**

**~Were you in college or high school in 2024? \_\_\_\_\_\_\_\_\_**

**~Do you have a 2025 IRS IP PIN Number? \_\_\_\_\_\_\_\_\_\_ (either in the mail or online)**

**~If you get a refund and want Direct Deposit, we will need, unless we already have it:**

**Bank Name\_\_\_\_\_\_\_\_\_\_\_\_ Routing #\_\_\_\_\_\_\_\_\_\_\_ Account #\_\_\_\_\_\_\_\_\_\_\_\_ Cking or savings**

**If you owe money, do you want to do Pay online or Mail Check**

**~Do you have a Driver’s License/ Permit? \_\_\_\_\_**

**If so, we need a copy front and back, if we don’t have a current copy on file.**

**Checklist (most Common)**

**\_\_\_\_W2’s \_\_\_1099s \_\_\_\_Interest statements \_\_\_\_ Brokerage statements** **(Robinhood, Fidelity, Schwab, etc)** **(Need full statements- uploading them is appreciated)**

**~Did you have unemployment? Y\_\_\_\_\_ N\_\_\_\_\_\_ (You will need form 1099G)**

**~Did you have any virtual currency (Bought, Sold, Exchanged)?**

Dear Taxpayer(s),

This letter is to confirm our understanding of the terms of our agreement and outline the nature and extent of the services we will provide. **Based upon the information you furnish to us; we will prepare your Federal and applicable state income tax returns for 2024.**

We will not audit or verify the data you submit to us, although we may ask you for clarification when necessary. All the information you submit to us will, to the best of your knowledge, be correct and complete and include all other information necessary for the completion of your tax return.

We will also prepare 2025 estimated tax vouchers if required, based on your income and withholding taxes for 2024. **If you anticipate a substantial change in income or withholding taxes for 2025, please advise us as soon as possible.** We will then determine whether an adjustment should be made to your tax estimates.

Your returns are subject to review by the taxing authorities. Any items that may be resolved against you by the examining agent are subject to certain rights of appeal. In the event of an examination, we will be available upon request to represent you, or to review the results of any examination. Billing for these additional services will be at our standard rates. **We will charge a postage fee for any returns we have to mail. Any additional hard copies will be available for an additional fee.**

**Our secure Tax portal is available as long as you are a client, we do suggest downloading and keeping a backup of your files.**

**The charges for our services are based on our fee schedule and the complexity of the returns. I agree to pay my bill, in full at the time of service. Payment options are Cash, Check or Card.**

**You have the final responsibility for your income tax returns. Please review them carefully before you sign them for Efiling.**

**With my signature I am attesting that all information submitted to Walrath Tax   
Service is true, correct, and complete to the best of my knowledge.**

**If the above is in accordance with your understanding of the terms and conditions of our agreement, please sign and return a copy of this letter.**

Please Sign: Taxpayer\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_