WePrep Tax Services, LLC 2023
CLIENT TAX QUESTIONNAIRE

(Please Print)

TAXPAYER INFORMATION

Taxpayer Last Name:	First:	Middle:	Suffix:	☐ Mr.	☐ Miss	Marital Status:
				☐ Mrs.	☐ Ms.	Single☐ Married☐ Div ☐ Sep☐Widow☐ ☐

Social Security Number:	Date of Birth:	Age:	Occupation:	Home Phone:	Cell Phone:

Email Address:	Preferred Method of Contact:
	Home Phone ☐ Cell Phone ☐ Email ☐ Text☐

Street Address:	Apt. #:

City:	State:	Zip Code:

Did your marital status change during the year?	☐ Y	☐ N	Did your address change during the year?	☐ Y	☐ N

SPOUSE INFORMATION

Spouse Last Name:	First:	Middle:	Suffix:	☐ Mr.	☐ Miss
				☑ Mrs.	☐ Ms.

Social Security Number:	Date of Birth:	Age:	Occupation:	Cell Phone:

Email Address:

Dependents Name (Last, First)	Relationship	Date of Birth mm/dd/yyyy	Social Security Number	Months Lived With You	Full-Time Student		Did You Provide More Than Half of the Support?	
					☐ Y	☐ N	☐ Y	☐ N
					☐ Y	☐ N	☐ Y	☐ N
					☐ Y	☐ N	☐ Y	☐ N
					☐ Y	☐ N	☐ Y	☐ N

					☐ Y	☐ N	☐ Y	☐ N

• Do you provide a home for or help support anyone else, not listed above?	☐ Y	☐ N
• Were there any births, deaths, marriages, divorces or adoptions in your immediate family in 2023? ***(If yes, list details in "Other Information" Section on page 3)***	☐ Y	☐ N
• Could you be claimed as a dependent on another person's tax return for 2023?	☐ Y	☐ N
• If requested by the IRS, do you have documentation (i.e. receipts, records) to substantiate your eligibility for the Child Tax Credit, Earned Income Tax Credit and/or Head of Household Filing Status?	☐ Y	☐ N

INCOME INFORMATION

• Did you receive any income from employment as an employee or independent contractor? ***(If yes, attach Form W-2 and/or 1099-NEC)***	☐ Y	☐ N
• Did you receive any Unemployment Compensation in 2023? ***(If yes, attach 1099-G)***	☐ Y	☐ N
• Did you receive any Social Security benefits during 2023? ***(If yes, attach Form SSA-1099)***	☐ Y	☐ N
• Did you sell any Stocks/Investments in 2023? ***(If yes, attach 1099-B)***	☐ Y	☐ N
• Did you receive Interest Income from a savings account or dividends from mutual funds/investments? ***(If yes, attach Form 1099-INT and/or 1099-DIV)***	☐ Y	☐ N
• Did you have any gambling winnings or losses, including lottery, bingo and raffles? ***(If yes, attach W2-G)***	☐ Y	☐ N
• Did you receive, sell, exchange or dispose any virtual currency?	☐ Y	☐ N

RETIREMENT INFORMATION

• Did you or your spouse receive payments/distributions from a retirement plan such as a pension, 401K, IRA) in 2023 or plan to in 2023? ***(If yes, attach Form 1099-R)***	☐ Y	☐ N
• Did you receive a distribution from a retirement plan in order to pay medical bills, for higher education expenses or to purchase a home in 2023? ***(If yes, list reason: ________________________________)***	☐ Y	☐ N
• Did you make any contributions to a retirement plan such as a pension, 401K, IRA, SEP, SIMPLE in 2023?	☐ Y	☐ N
• In 2021, did you take a Covid related distribution from a 401K plan, IRA or other qualified plan and was the inclusion of distribution on your 2021 Tax Return deferred for three years - 2021, 2023 and 2023?	☐ Y	☐ N

HEALTH INFORMATION

• Did you purchase health insurance from the Healthcare.gov Marketplace in 2023? ***(If yes, attach Form 1095-A)***	☐ Y	☐ N
• Did you or your spouse participate in a Health Savings Account (HSA) or other Medical Savings Account in 2023? ***(If yes, attach Form 1099-SA and Form 5498-SA)***	☐ Y	☐ N
• Did you/ spouse/dependent incur a substantial amount of unreimbursed medical expenses in 2023?	☐ Y	☐ N

HOUSING INFORMATION

• Do you own a home? ***(If yes, attach Form 1098 – Mortgage Interest and 2023 Property Tax Statement)***	☐ Y	☐ N
• Did you rent during 2023? If yes and total household income is less than $63,000, answer the following:	☐ Y	☐ N

a. Name and address of Landlord:	
b. Monthly rent paid in 2023:	

c. Number of months rented:			
d. Is Heat included in your rent payment?		☐ Y	☐ N
• Did you sell and/or purchase a home in 2023? ***(If yes, attach Closing Disclosure & 1099-S)***		☐ Y	☐ N
• Did you receive rent from real estate or other property? ***(If yes, attach support for income and expenses)***		☐ Y	☐ N
• Was your principal home or rental property foreclosed on in 2023? ***(If yes, attach 1099A or 1099C)***		☐ Y	☐ N
• Did you make any energy efficient improvements to your home in 2023? ***(If yes, list amount $____________)*** n			

CHILD AND DEPENDENT CARE

• Did you receive dependent care benefits from your employer in 2023?	☐ Y	☐ N
• Did you pay any child/dependent care expenses in 2023 for a child under 13 years old or costs to care for a handicapped individual? If yes, complete the following:	☐ Y	☐ N

Name of Child Care Provider:	**Provider EIN/Social Security Number:**
Provider Address	**Amount Paid to Provider**
	$

EDUCATION

• Did you, your spouse or a dependent incur any tuition, fees or book expenses that were required to attend college, university, or vocational school in 2023? ***(If yes, attach 1098-T and support for expenses)***	☐ Y	☐ N
• Did you, your spouse or a dependent receive scholarships or grants for higher education in 2023?	☐ Y	☐ N
• Did you, your spouse or dependent receive a distribution from a 529 Plan or Education Savings Plan in 2023?***(If yes, attach Form 1099-Q.)***	☐ Y	☐ N
• Did you make any contributions to a 529 Plan or Education Savings Plan in 2023? ***(Attach support)***	☐ Y	☐ N
• Did you pay any Student Loan Interest in 2023? ***(If yes, attach Form 1098-E)***	☐ Y	☐ N

ITEMIZED DEDUCTIONS

Note: The IRS allows taxpayers to reduce their income by taking the higher of the Standard Deduction or Itemized Deductions. For 2023, the standard deduction is $12,250 for Single Filers, $18,800 for HOH and $25,100 for Married Filers.

• Did you make charitable contributions in 2023? ***(If yes, attach receipts or acknowledgements from charity, cancelled check or other proof)***	☐ Y	☐ N
• Did you use your vehicle to provide volunteer services to a charity?	☐ Y	☐ N
• Did you pay state taxes on new vehicle purchased or monthly lease in 2023?	☐ Y	☐ N
• List your vehicle registration fees. $ ________________________		
• Did you owe State or Local taxes when you filed your 2021 Income Tax Return? If yes, please list amount paid in 2023? $________________________	☐ Y	☐ N

MISCELLANEOUS QUESTIONS

- Did you purchase a new plug-in Electric Vehicle in 2023 or plan to in 2023? If so, please list the make, model, vehicle's Vehicle Identification Number (VIN), purchase date and cost of vehicle on line below: $

Did you live in any other states in 2023? ☐ Y ☐ N If yes list the address:________________________________

BUSINESS INFORMATION				
Note: Complete this section if you received a 1099-NEC, 1099-MISC, 1099-K or own a small business				
• Name of your Business:	Date you started your business:	EIN:		
• Did you materially participate in this business in 2023?			☐ Y	☐ N
• Did you pay estimated taxes in 2023?			☐ Y	☐ N
• Do you have records to support your business expenses? If yes, please attach receipts,			☐ Y	☐ N
• Did you use your vehicle for your business?			☐ Y	☐ N
• Do you have written evidence to support your vehicle expenses? Please list the following: and the attached mileage log			☐ Y	☐ N

Business Miles Driven in 2023		Commuting Miles Driven in 2023	Other Miles Driven in 2023
Jan-June 30 :	July-Dec 31 :		

FILING QUESTIONS		
• Did you receive or request a six-digit Identity Protection PIN number from the IRS?	☐ Y	☐ N
• The IRS is able to deposit refunds directly into up to (3) taxpayer's accounts. If you receive a refund, would you like a direct deposit?	☐ Y	☐ N
• If yes, please provide the following information:		

Name of Bank	Bank Routing Number	Bank Account Number	Type of Account
			☐ Checking ☐ Savings
			☐ Checking ☐ Savings
			☐ Checking ☐ Savings

How did you hear about WePrep Tax Services?	☐ Family/Friend (List Name):	
☐ Google/Website Search	☐ Other (List Source):	☐ Instagram/Facebook:

ADDITONAL INFORMATION

WePrep Tax Services, LLC

Client Service Agreement:

We appreciate your choosing WePrep Tax Services, LLC to prepare your income tax return. Open communication is a vital factor in any relationship. Our goal is to communicate with you in a manner that keeps you well informed. Considering this goal, we want to outline what you can expect from us, and we will expect from you in preparing your individual income tax returns.

What you can expect from us:

Our bill to you will be based on time spent preparing your tax return. This includes any meetings and telephone calls, as well as time spent in actual preparation and review. We use standard billing rates, which we believe approximate comparable practitioners in this area. Our goal is to prepare your return as efficiently as possible, while maintaining the accuracy that quality service requires.

- We will prepare your tax return from the information you furnish. We will not audit or verify your information, but we may ask you to clarify some points. We will be diligent in keeping current with tax law and use it to your best advantage.
- Our normal tax services do not include compiling information. However, we can compile and organize your data as an additional service.
- We will be available to answer your inquires on specific tax matters and to consult with you on income tax planning, at our standard billing rate.
- Should you ever be audited, we will be available to assist you if you desire. This is a separate service and will be billed at our standard rates for this type of work.
- We endeavor to prepare your tax return with the utmost accuracy. However, if an error on our part results in additional taxes, we will be responsible for penalties and interest which may be assessed. The additional tax due is your responsibility.

What we will expect from you:

- You will provide us with all relevant and necessary information affecting the return. Please remember that the more organized you are, the less time it will take us to prepare your return.
- **FOR NEW CLIENTS with Dependents**: Please remember to submit copies of social security cards, birth certificates and proof of residency (possibly birth certificates, ID, school records or medical records showing the dependents named and proof of YOUR address). Dependent Information: Birth Certificates and Proof of Residency is required for children under age 18.
- **FOR TAXPAYERS CLAIMING COLLEGE TAX CREDITS:** Please remember to submit copies of the Form 1098T that you received from the college AND a copy of the statement from the college showing the spring and/or fall semester charges and payments. The Credit applies to all payments made in cash or via student loans to tuition, fees and related expenses. IT does NOT apply to Room and Board or travel expenses.
- **FOR TAXPAYERS CLAIMING HEAD OF HOUSEHOLD FILING STATUS:** It is important to complete both the dependent questions and the Household [NOTE: If the divorce is NOT final or you and your spouse lived together AT ANY TIME in the last 6 months of the tax year, you CANNOT claim Head of Household filing status] IF you have any questions about the questionnaire please do not hesitate to ask. We will be glad to assist you.
- You will retain records and documentation of any deductions and business expenses. Please be aware that if you are audited, you can expect the IRS to ask for written documentation on travel, meals and entertainment, business use of autos and computers, and they will likely ask about bartering transactions.

We are relying on you to be able to verify any information you supply us. Failure to keep adequate records or to substantiate items upon audit can lead to the imposition of a negligence penalty.

- You will have the final responsibility for the tax returns and, therefore, you should review the returns carefully before signing and filing. The tax law imposes a severe penalty if a taxpayer makes a substantial understatement of tax liability. For individuals, a substantial understatement is one that exceeds the greater of 10% of the tax required to be shown on the return, or $5,000. The penalty is 20% of the tax underpayment. We will discuss tax positions that may increase the risk of exposure to penalties and any recommended tax return disclosures with you before completing the preparation of the returns.
- If the IRS adjusts your taxable income following an audit, penalties will be assessed with interest. These fees, as well as the tax deficiency, will be your responsibility.
- Payment for our services is expected upon presentation of the invoice and/or receipt of the completed tax return. Any invoice not paid within 30 days of receipt may be subject to a monthly interest charge of 1.5%.
- We hope you will feel free to discuss any aspect of this letter. If you fully understand what we will do and what we expect from you, please sign and return one copy to us. This will remain in effect for future years unless amended or terminated in writing by either of us.

Client(s) Acknowledgement:

Primary Signature:____

Print Name: ____

Date: ______________________

Spouse Signature:____

Print Name: ____

Date: ______________________

CONSENT TO USE OF TAX RETURN INFORMATION
For the purposes of this consent form, “we,” “us,” and “our” mean
WePrep Tax Services, LLC
(Printed Name of Tax Preparer)

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use your tax return information for purposes other than the preparation and filing of your tax return without your consent.

You are not required to complete this form to engage in our tax return preparation services. If we obtain your signature on this form by conditioning our tax preparation services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

If you do not consent, you may still have your tax return prepared and electronically filed by us for a fee.

For your convenience, we have entered into an arrangement with third parties to provide qualifying taxpayers with the opportunity to apply for an Electronic Refund Disbursement Service and/or Loan product. To determine whether these products may be available to you, we will need to use your tax return information in order to calculate the amount of your anticipated refund.

If you would like us to use your tax return information to determine whether these products may be available to you while we are preparing your return, please sign and date this consent to the use of your tax return information.

By signing below, you authorize us to use the information you provide to us during the preparation of your 2023 tax return to determine whether to present you with the opportunity to apply for these products and services.

Printed Name of Taxpayer: ____

Taxpayer Signature: __________________________________Date: ________________

Printed Name of Joint Taxpayer (if applicable): __________________________________

Joint Taxpayer Signature (if applicable): ____________________Date: _______________

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by e-mail at complaints@tigta.treas.gov.

CONSENT TO DISCLOSURE OF TAX RETURN INFORMATION

For the purposes of this consent form, “we,” “us,” and “our” mean
WePrep Tax Services, LLC
(Printed Name of Tax Preparer)

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage in our tax preparation services. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

You have indicated that you are interested in receiving an Electronic Disbursement Service and/or Loan (or collectively, “Products or Services”) from Pathward, National Association. In order to provide you with the opportunity to apply for one of these Products or Services, we must disclose all of your 2023 tax return information necessary for evaluating the request to Pathward. If you request a more limited disclosure of tax return information, you will not be eligible to submit an application request for these Products or Services. If you would like us to disclose your 2023 tax return information for this purpose, please sign and date your consent to the disclosure of your tax return information.

By signing below, you authorize us to disclose to Pathward all of your 2023 tax return information necessary for the evaluation and processing of your request for a Product or Service. You understand that if you are unwilling to authorize the disclosure and sharing of your tax return information with Pathward, you will not be able to obtain a Product or Service, but you may still choose to have your tax return prepared and filed by us for a fee.

Printed Name of Taxpayer: ____

Taxpayer Signature: ______________________________ Date: ________________

Printed Name of Joint Taxpayer (if applicable): ______________________________

Joint Taxpayer Signature (if applicable): __________________ Date: ________________

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by e-mail at complaints@tigta.treas.gov.

WePrep Tax Services, LLC
Privacy Policy

Tax Professionals, like all providers of personal financial services, are now required by law to inform their clients of their policies regarding privacy of client information. Tax Professionals and Accountants have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. Therefore, we have always protected your right to privacy.

Types of Nonpublic Personal Information We Collect

We collect nonpublic personal information about you that is provided to us by you or obtained by us with your authorization.

Parties to Whom We Disclose Information

For current and former clients, we do not disclose any nonpublic personal information obtained during our practice except as required or permitted by law. Permitted disclosures include, for instance, providing information to our employees, and in limited situations, to unrelated third parties who need to know that information to assist us in providing services to you. In all such situations, we stress the confidential nature of information being shared.

Protecting the Confidentiality and Security of Current and Former Clients' Information

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

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Please call if you have any questions, because your privacy, our professional ethics, and the ability to provide you with quality tax preparation services are very important to us.