2024 Tax Year Welcome Packet

Your 2024 Filing Status:

___Single ____Married Filing Jointly ___Married Filing Separately ___Head of Household ___Widowed
Note: If you have Divorced, are claiming Head of Household, or Widowed during the 2024 year you need to provide all Spouse and Dependent information. If Widowed In 2024, please let me know for sending additional instructions and information details.

I also need earlier years: _____2023, ______2022, _______2021 ______Earlier
__________My dependent has worked and will need tax services too.

NOTE: Please send **ALL** documents SAFELY and SECURLY using the tax portal instructions indicated in this document. Tax preparation will not begin until ALL documents have been sent. If you send information *after* the tax return has been prepared and presented back to you for approval, an additional fee of $25 will be added each time the tax return has to be presented again to you with the added information.

Taxpayer Name:	
Full Mailing Address:	
Email Address:	Phone Number:
Date of Birth:	SS#:
Occupation:	
Reminder: **Upload a Copy of your Driver's License** and your Social Security Card!	
Were you sent an **Identity Security PIN** from the IRS? Please include that document!	

Joint Taxpayer Name:	
Full Mailing Address:	
Email Address:	Phone Number:
Date of Birth:	SS#:
Occupation:	
Reminder: Upload a Copy of your Driver's License and your Social Security Card!	
Were you sent an Identity Security PIN from the IRS? Please include that document!	

If You Receive A Refund, Where Would You Like It Sent?	
Name of Bank or Credit Union:	
Account #	Routing #
Checking or Savings Account? __________Checking __________Savings	

DEPENDENT INFORMATION

1 Name:	DOB:	SS:
2 Name:	DOB:	SS:
3 Name:	DOB:	SS:
4 Name:	DOB:	SS:
5 Name:	DOB:	SS:
6 Name:	DOB:	SS:
7 Name:	DOB:	SS:
8 Name:	DOB:	SS:
9 Name:	DOB:	SS:
Reminder: Upload a Photocopy of EVERY Dependent's Social Security Card and Include Birth Dates!		

Scans to Upload for Regular Tax Preparation:

- ☐ Photocopy of **Current Driver's Licenses of Taxpayer and Spouse** (If Married In 2024, or Partner)
- ☐ Photocopy of All **Social Security Cards** for Taxpayer, Spouse, Children, and Other Dependents
- ☐ All **W2s**, All Types of **1099s**, or **Schedule K-1** Forms – Any End of Year Document that says **TAX FORM**
- ☐ If you are on the Marketplace (Obamacare) please include form **1099A**
- ☐ All Personal **Property Tax,** Real Estate, and **Mortgage Interest Year End Tax Reports**
- ☐ **State and Local** Income **Tax** Amount Paid in Tax Year
- ☐ Health Care Amounts Paid Out of Pocket **if over 7% of total income**.
- ☐ Total Mileage Driven for Medical or Charitable Donations **if over 7% of total income**.
- ☐ All Records of Contributions Toward Retirement, Such as **IRAs**
- ☐ All Records of Contributions Toward Healthcare, Such as **HSAs**
- ☐ **Donations** Made to Schools, Religious Organizations, and Other Charitable Institutions.
- ☐ **Unemployment Income** (If Any) and Costs Related to Job Search
- ☐ **Income from Gaming** (If Applicable) as well as **Win/Loss Statement Paperwork from Casinos**
- ☐ Income from State or Federal from the Previous Year **1099-G**
- ☐ Investment and Interest Expenses (Example: **Year-End Bank Interest**)
- ☐ **Stocks** or Other **Property Sold**, as well as All Purchase Dates. You Must Upload Documents the Investment Company Sent Indicating "**TAX DOCUMENTS FINAL**"

Business Expenses: Do You Own a Personal Business, or Received a 1099MISC? You May Have Additional Deductions or Credits!

- ☐ Schedule C or Business Expense Info Needed:
  - Name of Business/What Does This Business Do? /Address of Business /**EIN of Business**
    - How Much Did the Business Make?
    - 1099s for the Business Are Included in a Schedule C
  - Mileage of Car(s) Used for Business – **Odometer Reading at End of Year**
    - **Scan Registration Title of Car used for Business.**
    - How Many Miles Were Used for Business?
  - Totals of Expenses Used for the Business Year. Here are Category Examples:
    - Cell Phone
    - Uniforms
    - Subscriptions and Dues
    - Tools and Supplies
    - Repairs and Maintenance
    - Contractor Expenses
    - Insurance Expenses Related to the Business
    - Travel, Tolls, Parking
    - Taxes and Licenses
    - I Need to Know If You Are on Location Overnight for Periods of Time (Example: An Offshore Worker Who Works 30 On, 30 off).
    - Legal and Professional Services
  - Assets (Equipment) used for Business
    - Send Titles/Invoices of All Business Purchases – or Date/Amount Paid

Even More Credits and Deductions!

For Personal Returns:
What has been listed are the most common requests needed for an individual tax return.
There may be other deductions and credits you can take advantage of, such as if you had damage during a hurricane season, so please also refer to this link for the full listings of credits and deductions:
LINK: https://www.irs.gov/Credits-Deductions-for-Individuals

For Business Returns:
What has been listed are the most common requests needed for a business tax return.
Please refer to this link for the full listings of credits and deductions:
LINK: https://www.irs.gov/credits-deductions/businesses

Everything Ready to Send?

Everything ready? Please upload your scanned files

USE DROPBOX LINK OR SCAN THE QRC CODE TO UPLOAD YOUR FILES:
https://www.dropbox.com/request/Q3XBGqJLmpanltHnN24h

About Fees:

The fee for the preparation of your tax returns is based upon the unique forms and schedules needed to prepare an accurate return for you. All invoices are due and payable upon presentation.

CTP keeps their fees as low as possible so that we can pass the savings along to you!
Payment, unless otherwise indicated, is due upon receipt of Tax Preparation presentation.
If not otherwise indicated, pricing is $55/HR.

Individual Pricing:

General Conversation | ½ Hour | How Can CTP Assist You (New Clients Only)........FREE
Basic Review of Prior Year Taxes (New Clients Only)........FREE
1040 Tax Return (Includes 1040EZ, 1040A) *starting at**........ $100
State Tax Return (Each State) *starting at**........ $75
Dependent Tax Return (If filed when parents file at same time) *starting at*........ $75

Individual Pricing Additional:

Schedule B (Interest and Dividends) *starting at**........ $50
Schedule C (Sole Proprietor Business) *starting at**........ $100
Schedule D (Capital Gains and Losses) *starting at**........ $50
Schedule E (Rental Properties) *starting at**........ $75
Schedule F (Farm) *starting at**........ $75
Other Schedules Specifically Populated *starting at**........ $50
Additional Schedules that Automatically Populate/No Input Needed........FREE
1040x (Amended Return) *starting at**........ $175
Look under Added Services

Other:

NFP (Non-Profit) Tax Return EZ Postcard *starting at**........ $150
Annual Report Updates for LLCs (GeauxBiz only in Louisiana)........ $50
LLC Formation Assistance (Pre-Pay) *starting at**........$400

Added Services:

Presenting New Information AFTER Tax Return Has Been Prepared & Presented |Per Update	$25
Soft Copy of Final Tax Preparation	*1 COPY INCLUDED AND EMAILED TO YOU FREE*
Soft Copy Requested of Previous Years | Per Year – (Pre-Pay)	*price per year* $15
Paper Copy of Final Tax Preparation + Mailing – (Pre-Pay)	$25
Request Tax Extension – (Pre-Pay)	$65
Creating Letter for Mortgage Company	*service not offered*
Sending Paper Tax Return by Priority Mail to IRS	$35
Sending Fax to IRS over 5 pages	$35

About Your Responsibility:

It is always your responsibility to provide the information required for the preparation of complete and accurate returns. You are responsible for keeping all documents, canceled checks, original receipts, accurate mileage charts, and other data that support reported income and deductions as requested by the IRS for a minimum of 3 years and up to 7 years. This is necessary to prove the accuracy and completeness of the returns to a taxing authority.

You are ultimately responsible for the safety of sending your information, so please send over sensitive documents as instructed.

You are ultimately responsible for the accuracy of your returns, so please review the final drafts carefully for accurate information.

CTP tax preparation work does not include any procedures to discover and organize the records you provide to us.

About Tax Letters from the IRS:

Taxing authorities like the IRS may randomly select your tax return for review. You will NOT receive phone calls or emails from the IRS, you will ONLY receive official letters – anything else is a FRAUD!

I look forward to assisting you!

Warm Regards,

Euna Poole

Tax Specialist
Questions? Contact euna@cypresstaxprep.com or call 337-600-4774