



2023 Tax Year Welcome Packet

Your 2023 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 2023 year you need to provide all Spouse and Dependent information. If Widowed In 2023, please let me know for sending additional instructions and information details.

I also need earlier years: ___ 2022, ___ 2021, ___ 2020 ___ Earlier

___ My dependent has worked and will need tax services too.

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:
Reminder: Upload a Photocopy of EVERY Dependent's Social Security Card and Include Birth Dates!		

Scans to Upload for Regular Tax Preparation:

- Everyone's Birthdays – Children Plus Any Other Dependents
- Photocopy of Current Driver's Licenses of Taxpayer and Spouse (If Married In 2022, 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
- Proof of Healthcare. 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



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- Donations Made to Schools, Religious Organizations, and Other Charitable Institutions.
- Income from 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 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
- If You Moved for Your Job More Than 50 Miles, You Are Eligible for Deductions If You Were Not Previously Reimbursed by Your Company

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>



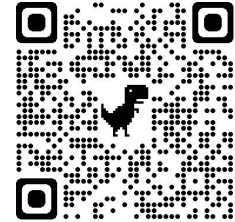
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Everything Ready to Send?

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 \$50/HR.

Individual Pricing:

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

Individual Pricing Additional:

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

***Look under Added Services**

Business Returns:

Business Tax Returns 1120, 1120s <i>starting at*</i>	\$800
Partnership Business Tax Return 1165 <i>starting at*</i>	\$800
NFP (Non-Profit) Tax Return EZ Postcard <i>starting at*</i>	\$150
Business State Tax Return <i>starting at*</i>	\$300
Franchise Taxes (Pre-Pay)	\$100
LLC Formation Assistance (Pre-Pay) <i>starting at*</i>	\$400
File Business Extension (Pre-Pay)	\$150

Added Services:

Presenting New Information AFTER Tax Return Has Been Prepared & Presented Per Hour.....	\$50
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 – (Pre-Pay).....	\$25



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Priority Mail Paper Copy of Final Tax Preparation – (Pre-Pay)	\$25
Request Tax Extension – (Pre-Pay)	\$65
Creating Letter for Mortgage Company	<i>service not offered</i>
Sending Paper Tax Return by Priority Mail to IRS.....	\$35

About Your Responsibility:

It is always your responsibility to provide the information required for 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 accuracy and completeness of the returns to a taxing authority.

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. If this additional service is requested from you, we can provide additional accounting and bookkeeping assistance necessary for additional preparation of your income tax returns for a fee as detailed in this letter.

About Tax Letters from the IRS:

It is possible that taxing authorities such as 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