



AvantiPRO
110 Crown Oak Centre Dr
Longwood, FL 32750
MyCPA@AvantiPRO.com

January 08, 2026

Client

:

Tax season is here, and we're ready to help you navigate the process. Here's how we'll handle your tax preparation for the 2025 tax year:

1. **Tax Organizer:** Your tax organizer will be delivered electronically via the AvantiPRO online portal or website. Prefer a paper copy? Call our office to request one.
2. **Submitting Documents:** You can send your completed organizer and tax documents via the portal, drop them off, or mail them to our office. If you're a new client, please call to schedule a drop-off appointment or phone call with Cathie.
3. **Questions and Updates:** We'll address your questions and provide updates via email or scheduled phone calls.
4. **Tax Return Delivery:** Completed tax returns will be delivered in-person at our office, online via Zoom, or by phone.

Helpful Documents

We've prepared the following to help you gather your tax information:

- **Tax Organizer:** We **STRONGLY** request you complete all questions to ensure accuracy and compliance with new IRS requirements.
- **Checklist:** A list of required documents, including **new items** for this year.
- **Engagement Letter:** Sign and return this along with your organizer and documents to begin processing.
- **Terms and Conditions Addendum:** Available on the portal and our website.

Important Notes for 2025

- **Electronic Payments:** All federal payments and refunds are required to be made electronically. Please include banking information with your documents.
- **Digital Assets:** The IRS continues to focus on digital assets. Please inform us of any transactions involving cryptocurrencies (e.g., Bitcoin, Ethereum, Dogecoin) or NFTs.
- **OBBC Act:** Many changes in the July tax act were retroactive to January 1, 2025, including benefits for tip and overtime income. Please include a copy of your final 2025 paystub as the W2 may not report the necessary details.

We value your trust and look forward to assisting you. Please check out our website www.AvantiPRO.com to share with friends. Contact our office at (407)331-7330 if you have questions or need more information.

Sincerely,

Cathie Mannion CPA, MBA, EA
AvantiPRO

2025 Tax Organizer Personal Information

Personal Information

Name		SSN	Has IP PIN	Date of Birth
Taxpayer	Client			
Spouse				
Name of person to whom all information should be addressed, if not the taxpayer				
Street address, city, state, and ZIP				
Occupation		Daytime Phone	Evening Phone	Cell Phone
Taxpayer				
Spouse				
Taxpayer email				
Spouse email				

Filing status at the end of 2025

Single Married Widowed - If widowed and your spouse died after December 31, 2023, enter the date of death _____
 Married filing separately - If married but filing separately, did you live apart from your spouse for the last six months of 2025? _____

Yes No

Are you or your spouse blind?
 Are you or your spouse disabled?
 Are you or your spouse a full-time student?
 Do you or your spouse want to designate \$3 to go to the Presidential Election Campaign Fund?
 At any time during 2025 did you:
 (a) receive (as a reward, award, or payment for property or service) a digital asset?
 (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

Identification Information

Taxpayer's type of photo ID

Driver's license State-issued photo ID

Photo ID number _____

State photo ID was issued _____

Date photo ID was issued _____

Date photo ID expires _____

Spouse's type of photo ID

Driver's license State-issued photo ID

Photo ID number _____

State photo ID was issued _____

Date photo ID was issued _____

Date photo ID expires _____

Account Information for Deposits and Withdrawals

Name of Bank	Bank Routing Number	Bank Account Number	Type of Account		Use this Account for	
			Checking	Savings	Deposits	Withdrawals

Appointment Information

Your 2025 appointment is scheduled for _____

Dependent and Other Information

Name: Client

SSN:

Dependent Information

First and Last Name SSN	Has IP PIN	Relationship	Months in Home	Date of Birth	Disabled	Full- time Student	Childcare Expenses

List dependents required to file a return

Child and Other Dependent Care Expenses

Name of Care Provider	Address	SSN or EIN	Amount Paid

Estimates

	Federal		Resident State		Resident City	
	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount
Overpayment applied from 2024						
First quarter						
Second quarter						
Third quarter						
Fourth quarter						
Additional payments						

Checklist

Name: Client

SSN:

Checklist

This checklist is provided to help you gather necessary information for us to prepare your 2025 income tax return. Return this list, along with the supporting documentation, to our office and let us know of any significant changes from your 2024 tax year.

General Information and Prior Year Documentation

- Proof of identity for those claimed on the return (driver's license or state issued ID, Social Security card, birth certificates for children, etc.)
- Income tax returns from the prior two years
 - If there were losses from business activities in prior years, include prior five years of returns instead of two
- Depreciation schedules from prior years for businesses, rentals, etc.

Current Year Income Documentation

- Wage and tax statements (Form W-2)
- Gambling income (Form W2-G)
- IRA distributions, pensions, and annuities (Form 1099-R)
- Dividend income (Form 1099-DIV)
- Interest income (Form 1099-INT)
- Miscellaneous income (Form 1099-MISC)
- Nonemployee compensation (Form 1099-NEC)
- Unemployment compensation and other government payments (Form 1099-G)
- Credit card, debit card, and third-party network transactions (Form 1099-K)
- Reportable payment transactions
- Social Security benefits (Form SSA-1099)
- Railroad retirement benefits (Form RRB-1099)
- Income from partnerships, S corporations, estates, and trusts (Schedule K-1)
 - Basis information for any partnerships and S corporations
- Documentation of brokerage transactions and disposition of capital assets (Form 1099-B)
- Digital asset proceeds from brokerage transactions (Form 1099-DA)
- Proceeds from real estate transactions (Form 1099-S)
- Self-employed business income (Schedule C)
- Farm income (Schedule F)
- Farm rental income (Form 4835)
- Income from rental real estates and royalties (Schedule E)

Other Income (provide supporting documentation for income received for the following items)

- Sale of assets or property
- Cancellation of debt
- Other income _____

Payments (provide supporting documentation for payments made for the following items)

- Educator classroom expenses
- Employee business expenses
- Contributions to a Health Savings Account
- Expenses related to work relocation with the military
- Alimony
- Student loan interest
- Refunded student loan interest payments
- Student loan forgiveness
- Tuition and fees for higher education
- Expenses related to child or dependent care
- Contributions to a Retirement Savings Account
- Medical and dental expenses
- Real estate taxes

Checklist

Name: Client

SSN:

Checklist

- Other state and local taxes
- Mortgage interest
- Investment interest
- Cash contributions
- Noncash contributions (provide organization name)
- Unreimbursed employee expenses
- Investment expenses
- Gambling losses
- Other payments _____

Questionnaire

Name: Client

SSN:

Questionnaire

Personal Information

Yes No

Did your marital status change during the year?
If "Yes," explain. _____

Did your name change during the tax year?
If "Yes," explain. _____

If your filing status is married, but you are filing separately from your spouse, did you and your spouse live apart for the last six months of 2025?

Can you or your spouse be claimed as a dependent by someone else?

Did you pay or receive alimony in 2025?

Did your address change during the year?

Were you, your spouse, or any dependents a victim of identity theft?
If "Yes," explain. _____

Were you, your spouse, or any dependents issued an Identity Protection PIN (IP PIN)? If yes, please provide IRS notification.
If "Yes," provide Notice CP01A from the IRS.

Provide proof of identity to be eligible to e-file your tax return (driver's license or state-issued photo ID)

Dependent Information

Yes No

Did you have any changes in dependents during the year?
If "Yes," explain. _____

Can another person qualify to claim any of your dependents?

Did you have any child or dependent care expenses during the year?

Did you have any adoption expenses during the year?

Did you have any children under age 18 or a full-time student under age 24 with more than \$2,700 of unearned income?

Provide documentation for proof of dependent credits (school records, medical records, daycare records, etc.)

Income, Purchases, Sales, and Debt Information

Yes No

Did you receive any tips not reported to your employer?

Did you receive any disability income during the year?

Did you cash in any U.S. savings bonds during the year?

Did you start a new business or purchase any rental property during the year?

Did you sell an existing business, rental property, or other property during the year?

Did you purchase any business assets or convert any assets to business use?
If "Yes," provide the cost of the asset, the date it was placed in service, and the business use percentage.

Did you purchase any gasoline, diesel, or special fuels for off-road business use?

Did you buy or sell any stocks, bonds, or other investments during the year?

Did you sell a principal residence during the year?
If "Yes," provide closing documentation for the purchase and sale of the home.

Did you have a principal residence or a piece of real property foreclosed on during the year?

Did you abandon a principal residence or a piece of real property during the year?

Did you refinance your principal home or second home or take out a home equity loan during the year?
If "Yes," provide all escrow, closing, and other pertinent documentation and information.

Did you receive any principal or interest during this year from property sold in prior years?

Did you rent out your home or use it for business?

Did you sell, exchange, or purchase any real estate during the year?

Did you acquire a new or additional interest in a partnership or S corporation?

Did you have any debts canceled or forgiven this year?

Does anyone owe you money that has become uncollectible?

Questionnaire

Name: Client

SSN:

Questionnaire

Did you purchase a new or previously owned clean vehicle (electric vehicle, plug-in hybrid, fuel-cell vehicle, qualified commercial clean vehicle) during the year?
If "Yes," provide the report the dealer or seller is required to provide to you and the vehicle identification number (VIN).

Did you receive income or incur expenses associated with a fantasy sports league?
If "Yes," provide documentation.

Did you receive income or incur expenses associated with car sharing (e.g., Lyft or Uber)?
If "Yes," attach Form 1099-MISC, Form 1099-NEC, or Form 1099-K.

Did you receive income or incur expenses associated with freelancing (e.g., Upwork or TaskRabbit)?
If "Yes," attach Form 1099-K or Form W-2.

Did you receive income or incur expenses associated with fashion sharing (e.g., Poshmark or thredUP)?
If "Yes," provide documentation.

Did you receive income or incur expenses associated with crowdfunding (e.g., Kickstarter or Indiegogo)?
If "Yes," attach Form 1099-K.

Did you receive income or incur expenses associated with a short-term rental (e.g., Airbnb, VRBO or HomeAway)?
If "Yes," provide documentation.

Did you receive income or incur expenses as an independent contractor (e.g., Shipt, Instacart, DoorDash)?
If "Yes," provide documentation.

Did you receive any other income you have not provided information for with this organizer?
If "Yes," explain. _____

Itemized Deduction Information

Yes **No**

Did you pay out-of-pocket medical or dental expenses (premiums, prescriptions, mileage, etc.) during the year?

Did you pay any long-term care premiums for yourself, your spouse, or a dependent during the year?

Did you receive any state or local income tax refunds from prior years?

Did you make any major purchases (vehicle, boat, etc.) during the year?

Did you pay any real estate property taxes or personal taxes during the year?

Did you pay mortgage interest during the year?

Did you make cash donations to charity during the year?

Did you make noncash donations to charity (clothes, furniture, etc.) during the year?

Did you donate a boat or vehicle during the year?
If "Yes," attach Form 1098-C.

Did you have gambling winnings or losses during the year?

Did you have any job-related expenses that were not reimbursed by your employer (uniforms, safety equipment, etc.)?

Did you use your vehicle on the job other than for commuting to work?

Did you work out of town at any time during the year?

Retirement Information

Yes **No**

Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?

Did you make any withdrawals or receive distributions from a pension or profit-sharing plan, IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?

Did you execute any rollovers from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan during the year?

Did you receive any Social Security benefits during the year?

Education Information

Yes **No**

Questionnaire

Name: Client

SSN:

Questionnaire

- [] Did you pay tuition expenses that were required for attending college, university, or vocational school for yourself, your spouse, or a dependent during the year (even if classes were attended in another year)?
- [] Did anyone in your household attend a post-secondary school during the year?
- [] Did you make a contribution to or receive a distribution from an Education Savings Account or Qualified Tuition Program during the year?
- [] Did you pay student loan interest for yourself, your spouse, or your dependents during the year?
If "Yes," provide the amount of interest that was refunded.
- [] Did you receive forgiveness on a qualifying federal student loan?

Health Care Information

Yes **No**

- [] Did any member of your household have healthcare coverage through the Marketplace (Obamacare)?
If "Yes," provide copies of Form 1095-A.
- [] Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA during the year?

Foreign Tax Information

Yes **No**

- [] Did you have a financial interest in or signature authority over a financial account or asset located in a foreign country?
- [] Did you receive a distribution from, or were you a grantor of, or transferor to, a foreign trust?
- [] Did the aggregate value of your foreign accounts exceed \$10,000 at any time during the year?
- [] Did you have any income from, or pay taxes to, a foreign country?
- [] Did you receive a Schedule K-3 from a partnership or S corporation?
- [] Did you have ownership in a foreign corporation at any time during the year?
- [] Did you own property in a foreign country?

Refund, Withholding, and Estimated Tax Information

Yes **No**

- [] If you have an overpayment of 2025 taxes, do you want the refund applied to your 2026 estimated taxes?
- [] Did you make any estimated payments toward your 2025 taxes?
- [] Did you apply an overpayment of your 2024 taxes to your 2025 estimated taxes?
- [] Do you want to have any refund or balance due directly deposited or withdrawn? NOTE: Due to Executive Order 14247, Modernizing Payments to and from America's Banking Account, refunds received by check will be delayed at least six weeks. Direct deposit of refunds is recommended.
If "Yes," provide a canceled checking or savings slip.
- [] Do you anticipate your income or withholdings to be different for 2026?

One Big Beautiful Bill Implications

Yes **No**

- [] Did you receive qualified tips reported on Form W-2 or a statement provided by your employer?
If "Yes," provide documentation or amount.
- [] Did you receive overtime pay reported on Form W-2 or a statement provided by your employer?
If "Yes," provide documentation or amount.
- [] Did you purchase a new passenger vehicle for personal use during 2025?
If "Yes," are the following true:

Yes **No**

- [] The final assembly was in the U.S.?
- [] The gross vehicle weight is under 14,000 pounds?
- [] The vehicle was not purchased with a lease?
- [] The vehicle was used to secure the loan?

- [] If you have a dependent born during 2025, do you want to establish a Trump Account?

Yes **No**

Questionnaire

Name: Client

SSN:

Questionnaire

[] If "Yes," do you want to receive a \$1,000 pilot program contribution?

Miscellaneous Information**Yes No**

[] Did you receive, sell, exchange, gift, or otherwise dispose of any digital asset or financial interest in any digital asset? If "Yes," provide any Forms 1099-DA received.

[] Did you incur a gain or loss due to damaged or stolen property, while living in a federally declared disaster area?

If "Yes," provide the incident date, value of the property, amount of insurance reimbursements, and the declaration number assigned by FEMA.

[] Did you pay wages to any household employees (babysitter, nanny, housekeeper, etc.)?

[] Did you make gifts to any one person in excess of \$19,000 during the year?

Yes No

[] If "Yes," are you splitting the gift with your spouse?

[] Did you incur moving expenses with the military during the year?

[] Have you been denied Earned Income Credit by the IRS?

[] Have you been re-certified for the Earned Income, Child Tax, or American Opportunity Credit?

[] Did you make any energy-efficient improvements to your main home during the year?

[] Are you a business owner who paid health insurance premiums for your employees during the year?

[] Did you receive a cash payment or digital asset of more than \$10,000 in one transaction or two or more related transactions during the year?

Yes No

[] If "Yes," was Form 8300, Report of Cash Payment over \$10,000 Received in Trade or Business, filed?

[] Do you own interest or shares in or did you dispose of a Qualified Opportunity Fund during the year?

[] Did you make any purchases subject to use tax during the year?

If "Yes," provide details.

[] Did you receive any notices from the IRS or state taxing authority?

If "Yes," explain. _____

[] May the IRS discuss your tax return with your preparer?

[] Would you like a copy of your tax return sent to you electronically instead of receiving a printed copy?

Preparer Notes

Schedule C - Profit or Loss from Business

Name: Client

SSN:

General Business Information

TS _____ Professional product or service _____ Employer ID number _____

Business name _____

Business address, city, state, ZIP _____

Accounting Method: Cash Accrual Other (specify) _____ This business started or was acquired during 2025. This business was disposed of during 2025.

Select if this business is for:

<input type="checkbox"/> Professional gambler	<input type="checkbox"/> Newspaper delivery and you are under 18 years of age
<input type="checkbox"/> Exempt Notary income	<input type="checkbox"/> A clergy

Yes No

<input type="checkbox"/> <input type="checkbox"/> Payments of \$600 or more were paid to an individual, who is not your employee, for services provided for this business.
<input type="checkbox"/> <input type="checkbox"/> If "Yes," did you file Forms 1099 for the individuals?
<input type="checkbox"/> <input type="checkbox"/> Did you receive a Paycheck Protection Program (PPP) loan for this business prior to June 1, 2021?
<input type="checkbox"/> <input type="checkbox"/> If "Yes," was any portion of the loan forgiven in 2025?

Income

	2025	2025
Gross receipts or sales	_____	Other income
Returns & allowances	_____	_____

Expenses

	2025	2025
Advertising	_____	Repairs & maintenance
Car & truck expenses	_____	Supplies
Commissions & fees	_____	Taxes & licenses
Contract labor	_____	Travel
Depletion	_____	Total meals
Employee benefit programs	_____	Utilities
Insurance (other than health)	_____	Wages
Interest - mortgage	_____	Family health coverage payments for taxpayer, spouse or dependents
Interest - other	_____	Other expenses (list)
Legal & professional services	_____	_____
Office expenses	_____	_____
Pension & profit-sharing plans	_____	_____
Rent or lease (vehicles, machinery, & equipment)	_____	_____
Rent (other business property)	_____	_____

Cost of Goods Sold

	2025	2025
Inventory at beginning of year	_____	Materials & supplies
Purchases	_____	Other costs
Cost of personal use items	_____	Inventory at end of year
Cost of labor	_____	<input type="checkbox"/> There was a change in inventory method.

Schedule E - Income or Loss from Rental Real Estate & Royalties

Name: Client

SSN:

General Property Information

TSJ _____

Property description _____

Address, city, state, ZIP _____

Select the property type

<input type="checkbox"/> Single family residence	<input type="checkbox"/> Vacation / short-term rental	<input type="checkbox"/> Land	<input type="checkbox"/> Self-rental
<input type="checkbox"/> Multi-family residence	<input type="checkbox"/> Commercial	<input type="checkbox"/> Royalties	<input type="checkbox"/> Other _____

Number of days property was rented _____ Number of days property was used for personal use _____

If the rental is a multi-dwelling unit and you occupied part of the unit, enter the percentage you occupied _____

<input type="checkbox"/> This property was placed in service during 2025.	Yes <input type="checkbox"/> No <input type="checkbox"/>
<input type="checkbox"/> This property was disposed of during 2025.	<input type="checkbox"/> Payments of \$600 or more were paid to an individual, who is not your employee, for services provided for this rental.
<input type="checkbox"/> This property is your main home or second home.	<input type="checkbox"/>
<input type="checkbox"/> This property was owned as a qualified joint venture.	<input type="checkbox"/> If "Yes," did you file Forms 1099 for the individuals?

Income

2025

2025

Rent income Royalties from oil, gas, mineral, copyright or patent

Expenses

Rental Unit
ExpensesRental and Homeowner
Expenses

Advertising .....	.....	.....
Auto & travel .....	.....	.....
Cleaning & maintenance .....	.....	.....
Commissions .....	.....	.....
Insurance .....	.....	.....
Legal & professional fees .....	.....	.....
Management fees .....	.....	.....
Mortgage interest .....	.....	.....
Other interest .....	.....	.....
Repairs .....	.....	.....
Supplies .....	.....	.....
Taxes .....	.....	.....
Utilities .....	.....	.....
Depletion .....	.....	.....
Other expenses	.....	.....
.....
.....
.....
.....
.....
.....
.....

If this Schedule E is for a multi-unit dwelling and you lived in one unit and rented out the other units, use the "Rental and homeowner expenses" column to show expenses that apply to the entire property. Use the "Rental unit expenses" column to show expenses that pertain ONLY to the rental portion of the property.

If the Schedule E is not for a multi-unit property in which you lived in one unit, complete just the "Rental unit expenses" column.

Schedule A - Itemized Deductions

Name: Client

SSN:

Medical and Dental Expenses

Health insurance premiums (paid by you, not through work)
 Amount above that is for Medicare premiums
 Long-term care premiums (you)
 Long-term care premiums (your spouse)
 Long-term care premiums (dependents)
 Mileage driven for medical purposes
 Out of pocket medical & dental expenses
 Doctor, dental, etc
 Prescription medicines
 Glasses & contacts
 Hearing aids
 Medical equipment & supplies
 Hospital services
 Laboratory services
 Nursing services
 Other _____
 Other _____

Taxes Paid

State and local income taxes
 General sales tax (vehicle, boat, home, etc.)
 Real estate taxes
 Personal property taxes
 Auto registration taxes not deductible for state
 Other taxes (list) _____

Interest Paid

Home mortgage interest paid (attach Form 1098)
 Some of your home mortgage loan was not used to buy, build, or improve your home.
 Home mortgage interest paid to an individual
 Paid to:
 Name _____
 Address _____
 City, State, ZIP _____
 SSN or EIN _____
 Points not reported on Form 1098
 Investment interest

Charitable Contributions

Donations to charity	Cash	Noncash	Amount
Church	<input type="checkbox"/>	<input type="checkbox"/>	_____
Boy or Girl Scouts	<input type="checkbox"/>	<input type="checkbox"/>	_____
Goodwill	<input type="checkbox"/>	<input type="checkbox"/>	_____
Red Cross	<input type="checkbox"/>	<input type="checkbox"/>	_____
Salvation Army	<input type="checkbox"/>	<input type="checkbox"/>	_____
United Way	<input type="checkbox"/>	<input type="checkbox"/>	_____
Veterans	<input type="checkbox"/>	<input type="checkbox"/>	_____
Hospital	<input type="checkbox"/>	<input type="checkbox"/>	_____
University	<input type="checkbox"/>	<input type="checkbox"/>	_____
Other _____	<input type="checkbox"/>	<input type="checkbox"/>	_____

Miles driven for charitable purposes

Other Miscellaneous Deductions

Amortizable bond premiums
 Federal estate tax
 Gambling losses
 Impairment-related work expenses
 Claim repayments
 Unrecovered pension investments
 Loss from other activities from Schedule K-1
 Ordinary loss debt instrument
 Excess deduction on termination

Job Expenses & Certain Miscellaneous Deductions

Necessary job expenses you paid that were not reimbursed by your employer
 Safety equipment, tools, & supplies
 Uniforms
 Protective clothing (shoes, hardhats, glasses, etc.)
 Dues to professional organizations
 Books & subscriptions
 Other _____
 Union dues
 Tax preparation fees
 Other nonpersonal expenses related to taxable income
 Safe deposit box fees
 Investment expenses not entered elsewhere
 Other _____
 Home equity interest



AvantiPRO
110 Crown Oak Centre Dr
Longwood, FL 32750
MyCPA@AvantiPRO.com

January 08, 2026

Client

Client:

Thank you for choosing AvantiPRO to assist you with your 2025 taxes. This letter summarizes the services that we will provide you, and the responsibilities you have for preparation of your tax return. A detailed **Terms and Conditions Memorandum**, dated December 31, 2025, which fully describes the terms of our agreement with you, has been placed into the AvantiPRO client portal and website. Those terms and conditions are adopted and incorporated by reference into this engagement letter and govern our agreement. Please read that memorandum before signing this engagement letter.

Tax Return Preparation

- We will prepare your 2025 federal and state tax returns based on information you provide. Services for preparation of your return do not include auditing or verification of information provided by you.
- This engagement does not include any audit or examination of your books or records. In the event your return is audited, you will be responsible for verifying the items reported.
- The tax return preparation fee does not include accounting services.
- Fees charged for tax return preparation include limited assistance and consultation during the year but do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
- The engagement to prepare your 2025 tax returns terminates upon delivery of your completed returns and original documents to you. Please store your supporting documents and copies of your tax returns in a secure place for at least seven years.

Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You agree all payments to and from the US government are your responsibility and must be made electronically.
- You must review the return carefully before signing to make sure the information is correct.
- Fees must be paid when your tax return is delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer is required for preparation of late returns.

Thank you for the opportunity to be of service. We appreciate your confidence in us. Please date and execute this Agreement and return it to us to acknowledge your acceptance. We will not initiate services until we receive the executed Agreement. If you have any questions, contact our office at (407)331-7330.

Sincerely,

Cathie Mannion CPA, MBA, EA
AvantiPRO

Accepted By: (Both spouses must sign for preparation of joint returns.)

Taxpayer	Date	Spouse	Date
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AvantiPRO
110 Crown Oak Centre Dr
Longwood, FL 32750
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January 08, 2026

Client

We value you as our client, and our privacy is important to us. CPAs have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by law. Please read the following privacy policy.

We collect nonpublic personal information about you from various sources, including:

- * Interviews regarding your tax situation
- * Applications, organizers, or other documents that supply such information as your name, address, telephone number, Social Security Number, number of dependents, income, and other tax-related data
- * Tax-related documents you provide that are required for processing tax returns, such as Forms W-2, 1099R, 1099-INT and 1099-DIV, and stock transactions

We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as requested by our clients or as required by law.

We restrict access to personal information concerning you, except to our employees who need such information in order to provide products or services to you. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your personal information.

If you have any questions about our privacy policy, contact our office at (407)331-7330.

Sincerely,

Cathie Mannion CPA, MBA, EA
AvantiPRO