Williams Accounting
& Tax Services LLC

TAX ONBOARDING
WELCOME PACKET

Contact Information

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Email: Admin@WilliamsAccTax.com

Dedicated to providing professional accounting and tax solutions with integrity.

Welcome Packet

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Williams Accounting
& Tax Services LLC

Engagement Letter

Dear Client:

Thank you for choosing Williams Accounting & Tax Services LLC to assist you with your taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide. We will review your current federal and state income tax returns. We will depend on you to provide the information we need to complete an accurate assessment and provide recommendations. We may ask you to clarify some items but will not audit or otherwise verify the data you submit. Review or revision of prior year(s) returns is also available at an additional charge.

We will perform services only as needed to review, revise or prepare your tax returns. Our work will not include procedures to find misappropriated funds or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will, of course, inform you of any material errors, fraud, or other illegal acts we discover.

The law imposes penalties when taxpayers underestimate their tax liability. Please call us if you have concerns about such penalties.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select.

Our fee will be based on the time required at the standard hourly billing rate plus any out-of-pocket expenses. The fee for this service has been quoted based on the answers provided in the Free Tax Prep Quote. If we find that information has been omitted or you provide additional information during the preparation process, additional fees may apply, increasing the total cost of the service. We will notify you if the price increases, allowing you to continue or discontinue service with our office. Amending a return originally prepared by our office free of charge. Invoices are due and payable upon presentation of the client preview and before scheduling an off-boarding meeting. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (30) days. Bank products offered will adhere to the policy and disclosures of the third-party vendor.

Required supporting documents must be submitted within 15 business days of the latter of receipt of this agreement and registration. Should you require additional time to gather and upload your documents, kindly inform us via email. Payment of fees is required prior to off-boarding, which includes taxpayer review, e-signing, submission, and transmission of the tax return to the IRS. Failure to remit payment and/or provide the necessary documents will result in the following actions:

(1) Free Extension Filing for returning paid clients 1040 on April 10^{th} of the current year,
(2) $165 Extension Filing Fee for Business Returns on March 10^{th} of the current year, and/or
(3) automatic termination of the engagement, releasing the company from any obligation to file taxes for the current year.

Extensions for new prospective 1040 clients are available at a fee of $100 via our website and have no obligation to file a tax return with our office.

This engagement includes two scheduled meetings via Calendly:
One Tax Onboarding Meeting limited to 15 minutes
One Tax Offborading Meeting limited to 15 minutes
Additional meetings, limited to 45 minutes each, are available for $350.

We will return your original records to you at the end of this engagement. You should securely store these records, along with all supporting documents, canceled checks, etc., as these items may later be needed to prove accuracy and completeness of a return. We will return copies of your records and our work papers for your engagement for seven years, after which these documents will be destroyed.

Our engagement to prepare your tax returns will conclude with the delivery of our analysis of your return along with any recommended clarifications or corrections. If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax return documents carefully before signing them.

Williams Accounting & Tax Services LLC reserves the right to deny or terminate services immediately if the client is unresponsive for more than 5 business days, uncooperative, suspected of fraud, or abusive towards our staff.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign the enclosed copy of this letter in the space indicated.

We are pleased to assist you with your tax matters and look forward to working with you.

Sincerely,

Brandi C. Williams

Brandi C. Williams, EA, MAcc
Founder of Williams Accounting & Tax Services LLC

Williams Accounting & Tax Services LLC

🛑 Tax Preparation Exclusions 🛑

State-Based Exclusions
Taxpayers not eligible if they reside in California, Oregon, Maryland, and New York
Exception: Active duty military in Maryland and New York are eligible

Community Property States – MFS
Taxpayers filing Married Filing Separately (MFS) in these states are excluded: Arizona, California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington, Wisconsin
Also excluded: The spouse of a taxpayer filing MFS in any state

Improper Head of Household Filing
Married taxpayers cannot claim Head of Household if:

- No divorce decree or legal separation by year-end
- Lived with spouse during the tax filing year.

*This list is not all inclusive and other exclusion may apply on a case-by-case basis.

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& Tax Services LLC

Getting started with Intuit Link

What is Intuit Link?

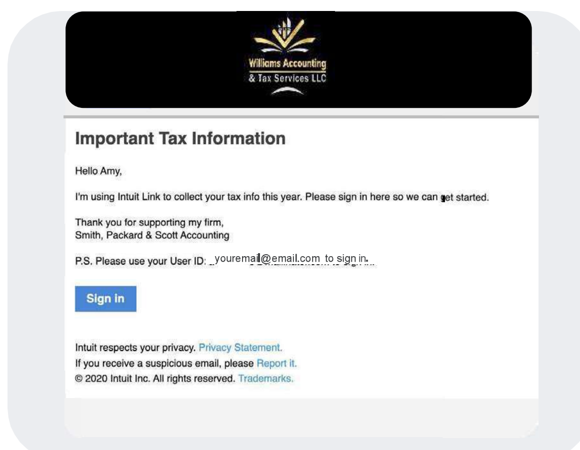
Intuit Link is an online portal for you and your accountant to connect and share tax documents to complete your tax return. No more bulky tax packets or piles of paper. Now you can deliver your information simply and securely online.

(STEP 1)

Access Intuit Link

To begin, open the invitation email from your accountant.

ACCEPT invitation or **SIGN IN** to access Intuit Link.



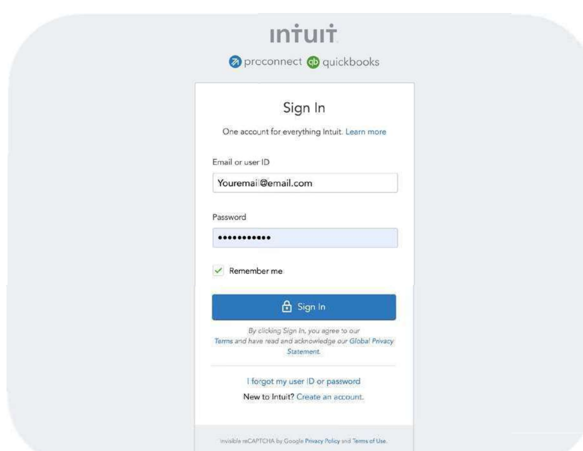
Sample email invitation to use Intuit Link from your accountant.

Returning users:

If you have used Intuit Link before or have an existing Intuit account **SIGN IN** *(do not sign up)* with your existing credentials.

New users:

If this is your first time using Intuit Link **SIGN UP** using the **SAME** email address from your invitation.



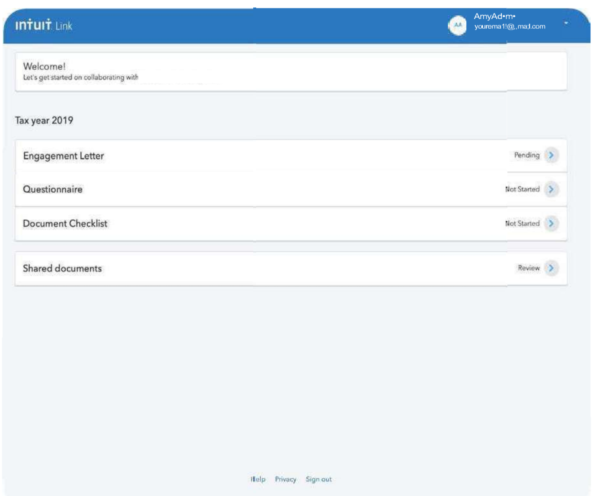
Sign in screen for Intuit Link.

Quick Tip: Your sign in email and invitation email should be the same.

(STEP 2)

Understand your Intuit Link

Intuit Link is home to all your requests for key information related to your upcoming tax return including your engagement letter, questionnaire, document checklist and shared documents.



Intuit Link homepage.

Engagement letter
Read, review, and sign your terms of agreement with your accountant.

Questionnaire
Answer a set of questions your accountant needs to prepare your tax return.

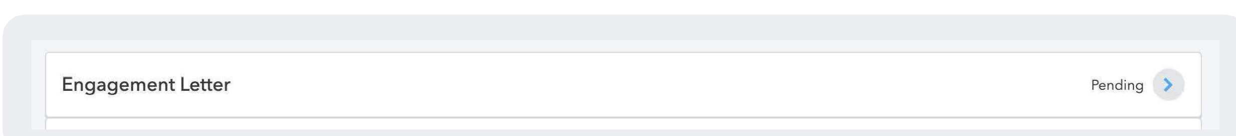
Document checklist
Review and share the documents your accountant needs to complete your tax return.

Shared documents
All your tax documents can be stored within Intuit Link.

(STEP 2)

Share Info With Accountant

First step, sign your engagement letter.



Open the engagement letter, review the agreement, then type your name to **ACCEPT** agreement. Once you **ACCEPT,** your agreement will be sent back to your accountant for review and marked **DONE** on your Link homepage.

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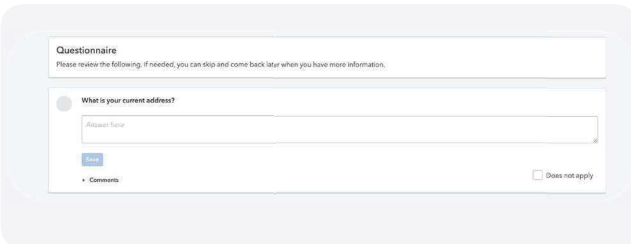
Getting started with Intuit Link

Next, complete the questionnaire.

Select a question from the list and type your answer in the respective field. **Save** your response to each question or mark **Does not apply** if the question doesn't apply to your tax situation.



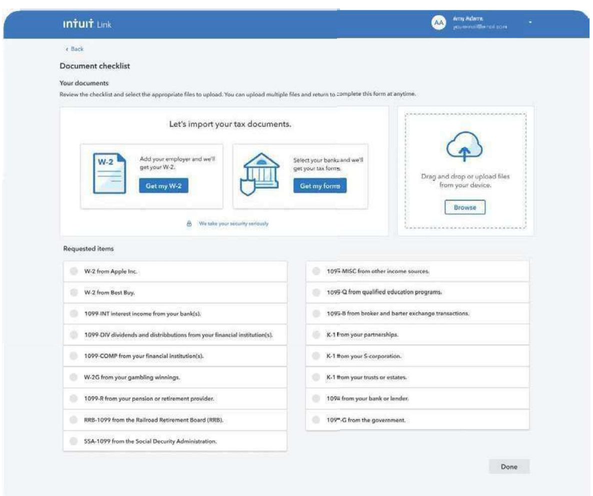
Sample question from Questionnaire.

Select **Comments** to leave a note and **Post** to share it with your accountant (optional).

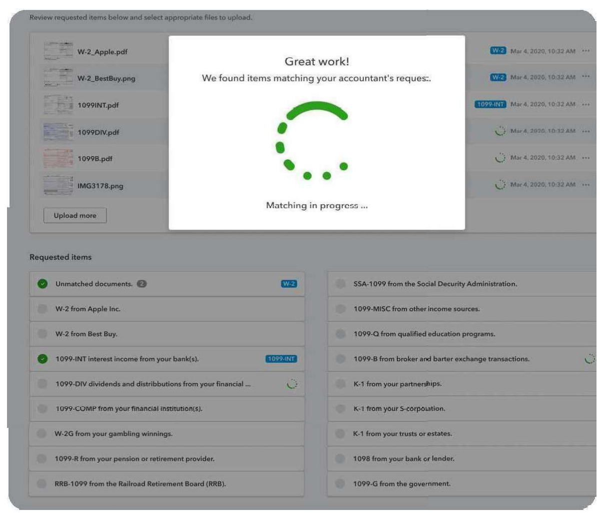
Continue this for each question listed and **Submit** to send responses to your accountant.

Final step, share your documents.

Add to your employer and financial institutions to securely pull in your tax forms and quickly share them with your accountant. You can also drag and drop them into the dotted area or **Browse** to upload files from your device.



Document checklist view with sample request.



Matching uploaded documents with requested items.

Viola, Intuit Link will match selected files to your **Document checklist** and notify your accountant as your documents are matched.

Great job, your work here is done.

Save More This Tax Season with Our Special Discounts!

Tax season is here, and we're excited to help you maximize your savings—not just on your return, but on our services too! We're offering a variety of exclusive promotions and discounts designed to make filing easier and more affordable.

🌟 **Available Discounts**

- **$50 Referral Program –** Available year-round when you refer a friend or family member.
- **$50 New Client Discount –** For first-time clients joining us this season.
- **$100 Early Filer Discount –** File by **February 16, 2026** to save.
- **$150 Simple W2 Package –** Includes up to two W2s, standard deduction, and child tax credit only (*State filing $50 and federal e-file $45 not included*).
- **$250 Retired Military Discount –** Honoring those who served.
- **$100 Active Military & Veterans Discount –** Available year-round.
- **$250 Tax Plan for 2026 –**Must elect this Tax Plan Promotion at the time of efile.

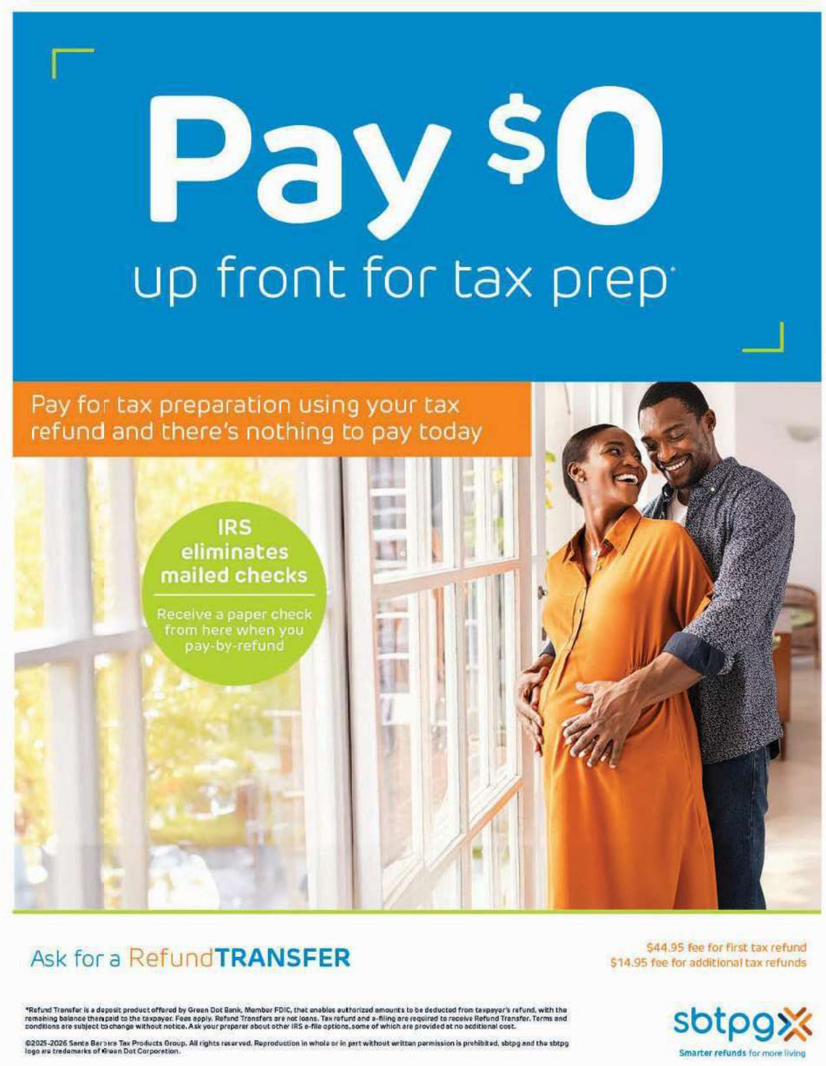
📅 **Important Dates**

- **Early Filer Discount ends February 16, 2026**
- **All other promotions expire March 31, 2026**
- **Referral and Military Discounts available year-round**

⚠️ **Please Note**

- Discounts **cannot be combined** with other offers, except the Referral Discount.
- Exclusions apply as noted above.

We appreciate your trust in us and look forward to making this tax season smooth, stress-free, and rewarding. Don't miss out—schedule your appointment today and take advantage of these limited-time savings!



Contact us at
Office Phone: (678) 782-3369
Website: WilliamsAccTax.com
Email: Admin@WilliamsAccTax.com

You've got better things to do than worrying about your tax returns. Which is why at Williams Accounting & Tax Services LLC we don't just make tax time easier; we make it smarter. Our team of professionals do everything they can to make sure you are getting back the largest refund you are entitled to. Ask us for a Refund Transfer and pay us $0 up front for professional tax preparation. That's right, when you select a Refund Transfer as your payment method, the cost to prepare your tax return automatically comes out of your tax refund, and you can choose from three convenient ways to get your refund money. Must be 18 years of age to qualify and have a refund of $350 after tax preparation fees are deducted.

Schedule your appointment today!

Benefits
- Easy-to-get and hassle-free
- No upfront fees for professional tax preparation
- Faster, convenient alternative to an IRS mailed check

Refund Available
- Usually within 21 days (direct deposit required)

Refund Transfer Fee
- Tax prep fees are taken out of the refund amount for you along with a $49.95 transaction charge

Dear Taxpayer,

Williams Accounting & Tax Services LLC is pleased to announce a new payment option through our partnership with SBTPG. With Pay with Refund, you can conveniently cover your tax preparation fees directly from your tax refund.

To qualify, your refund must be at least $350 after tax preparation fees. Simply ask about this option during your tax onboarding meeting, and we'll guide you through the process. Learn more by visiting SBTPG Pay With Refund .

Sincerely,

Williams Accounting & Tax Services LLC

Legal disclaimers

[1] Refund Transfer is a deposit product offered by Green Dot Bank, Member FDIC, that enables authorized amounts to be deducted from taxpayer's refund, with the remaining balance then paid to the taxpayer. Fees apply. Refund Transfers are not loans. Tax refund and e-filing are required to receive Refund Transfer. Terms and conditions are subject to change without notice. Ask your preparer about other IRS e-file options, some of which are provided at no additional cost.

Refund Transfers son productos de depósitos ofrecidos con Green Dot Bank, Member FDIC, y permiten ciertas deducciones de la cuenta a procesar. Refund Transfers no son préstamos. Se requiere el reembolso de impuestos y la presentación electrónica para recibir Refund Transfer. Se aplican cargos. Los términos y condiciones están sujetos a cambios sin previo aviso. Pregúntele a su preparador sobre las opciones de presentación electrónica del IRS, algunas de las cuales se proporcionan sin costo adicional.

[2] According to the IRS website most refunds (via mailed check) are disbursed in less than 21 days. It may be delayed even longer for other reasons. If this happens, you should contact them directly by calling the IRS Taxpayer Assistance Line (800-829-1040).

[3] Additional fees may apply. Check with your tax professional for availability

[4] Green Dot® card is issued by Green Dot Bank, Member FDIC, pursuant to a license from Visa U.S.A., Inc. Visa is a registered trademark of Visa International Service Association. Green Dot Bank also operates under the following registered trade names: GO2bank, GoBank and Bonneville Bank. All of these registered trade names are used by, and refer to, a single FDIC-insured bank, Green Dot Bank. Deposits under any of these trade names are deposits with Green Dot Bank and are aggregated for deposit insurance coverage up to the allowable limits.

[5] 1.9% rate valid until 12/31/25. Some Restrictions may apply. For full list of checks and fees visit www.amscot.com.

[6] Rates for cashing other types of checks and money orders at PLS will vary based on the type and amount of the check and other risk factors. Visit a PLS store for complete fee information.

For NY: PLS Check Cashers of New York, Inc. is licensed by the Superintendent of Financial Services pursuant to Article 9-A of the Banking Law.
For OH: PLS Check Cashers 1397 West Mound Street, Columbus, OH 43223 License CC.700135.
For MA: Check cashing license #CC0030.

[7] Cost is $4 or less for checks up to $1,000 and $8 or less for checks up to $7,500. Currently, check cashing at Walmart is not available in NJ and NY. The check limit at Walmart in CT is $6,000 and FL is $1,999.99 per person per day. Fees and limitations apply.

Williams Accounting
& Tax Services LLC

Form	Most Common Filings	Cost	Additional Comments
RET1040	Individual Income Tax Return	$ 200.00	each
FRMW2	Wages & Tax Statement	$ 50.00	each
FRM1098	Tuition, Mortgage	$ 50.00	each
FRM1098	Other	$ 50.00	each
FRM1099NEC	Nonemployee Compensation	$ -	Sch C/business return required
FRM1099	Various other income	$ 50.00	each
SCHA	Itemized Deductions	$ 100.00	
SCHB	Interest and Ordinary Dividends	$ -	
SCHC	Profit and Loss From Business	$ 200.00	each
SCHSE	Self Employment Tax	$ 50.00	each
SCHD	Capital Gains and Losses	$ 100.00	each
SCHE	Supplemental Income & Loss	$ 150.00	per schedule
FRM4562	Depreciable Asset	$ 35.00	per asset
SCHEIC	Earned Income Credit	$ 100.00	
FRM3115	Change in Accounting Method	$ 1,100.00	Starting and up
FRM8812	Credit for Qualified Children and Other Dependents	$ 50.00	
FRM8936	Electric Vehicle Credits	$ 85.00	
FRM8834	Qualified Plug In Vehicle Credit	$ 85.00	
FRM8863	College Education Credits	$ 85.00	
FRM8839	Adoption Credits	$ 85.00	
FRM990	Return of Organizatio Exempt	$ 1,200.00	starting
FRMMISC	Form	$ 50.00	other not listed
FRMGA500	State	$ 50.00	GADOR
FRMSTATE	State	$ 50.00	per state ($250 NJ,NY, & CA)
EFILE	Filing Fees	$ 45.00	Filing Fees

Business Filings

RET1120S	1120 S S-Corporation	$ 800.00	starting and up to $1,500
RET1120	1120 C-Corporation	$ 2,000.00	starting and up to $5,000
RET1065	Partnership	$ 800.00	starting and up to $1,500
SCHK1	K-1s	$ 25.00	each

Other Service Charges

DISC65	Seniors 65+	$ 125.00	*Only investments and 1099R
DISCMIL	1099 R - Military Retirement	$ (250.00)	*1040 fee waived also
DISCNEW	New Client Discount	$ (50.00)	1 per household
DISC150	$150 Simple W2 Promotion	$ (150.00)	1 per household
DISC100	$100 Early Filer Promotion	$ (100.00)	1 per household
DISCMVA	$100 Active Military & Veterans	$ (100.00)	1 per household
REFFERAL	Referral Discount	$ (50.00)	each
DISCEXT	Extensions -Individual/Personal	$ 100.00	each
BUSEXT	Extensions - Business	$ 165.00	each
FROM1040ES	Estimated Quarterly Tax Payments	$ 150.00	(Free for Payroll Clients)
QBOSETUP	QuickBooks Online Setup/Onboarding	$ 1,000.00	new QBO users
QBOONBOARD	QuickBooks Onboarding	$ 500.00	existing QBO users
QBOCORE	Monthly Bookkeeping Core Lite Services	$ 175.00	per month starting and up
QBOBOOK	Monthly Bookkeeping Basic Services	$ 400.00	per month starting and up
QBOASMLLC	Monthly Bookkeeping Annual SMLLC Services	$ 8,500.00	annually
QBOCLEANUP	QuickBooks Online Clean-up	$ 4,000.00	Starting and up per year
SHOEBOX	Unconventional recordkeeping clean-up	$ 350.00	per 50 transactions; 1 Account
ADDON50	Addon Account or 50 Transactions	$ 50.00	per additional account and 50 transactions
COSTSEG	Cost Segregation Partnership	$ 2,500.00	Starting and up (subject to quote)
FRM2553	1120 Subchapter S filing	$ 250.00	Scorp Filing
FRM2555	Foreign Income Exclusion 2555	$ 500.00	each
FBAR	Foreign Assets Reporting FBAR	$ 200.00	each
STREAM	Streamlined IRS Amnesty Processing	$ 1,550.00	per family
TAXACADEMY	Tax Academy Enrollment Online	$ 499.00	includes 30-min meeting/week for first 12 weeks.
ACCTAXTUTOR	Accounting TaxTutor Skool Subscription	$ 35.00	monthly subscription
MEETING	45-minute meeting	$ 350.00	via Calendly
MEETINGCL	45-minute meeting Core Lite Clients	$ 250.00	via Calendly
TAXPLAN	Tax Plan Promotion - Individuals	$ 250.00	with Tax eFiling
TAXADVIND	Tax Advisory - Individuals	$ 550.00	per quarter starting
TAXADVBUS	Tax Advisory - Business	$ 1,050.00	per quarter starting
TAXADVINDA	Tax Advisory - Individuals Annual	$ 2,050.00	annual discounted
TAXADVBUSA	Tax Advisory - Business Annual	$ 4,050.00	annual discounted

**Discounts expire March 31st of each tax filing year*

How to Setup an IRS Online Account

To Setup an IRS online account, follow these steps:

1. Visit the **IRS online account** page.
2. Select “Create an account” with **ID.me**.
3. Enter your email address.
4. Check your email for a message from ID.me and confirm your email by clicking the link provided.
5. Set up multi-factor authentication for added security.

Once your account is set up, you can access your individual account information, including your balance, payments, tax records, and more. Here are some features available through your online account:

- View Tax Records: Access key data from your most recently filed tax return, including your adjusted gross income and view transcripts.
- View Notices: Digital copies of certain notices from the IRS.
- Economic Impact Payments:
- Information about your stimulus payments.
- Child Tax Credit: Details about advance Child Tax Credit payments.
- Make Payments: Pay from your bank account, debit/credit card, or digital wallet. Payment History: View 5 years of payment history, including estimated tax payments.
- Payment Plans: Learn about payment plan options and apply for a new payment plan.
- Communication Preferences: Go paperless for certain notices and receive email notifications for account activity.

Remember, creating an online account allows you to manage your tax-related matters conveniently. If you have any questions or need further assistance, feel free to explore the official IRS website for more information.

For more information or to schedule a consultation, please contact us
Admin@WilliamsAccTax.com
Visit our site at www.WilliamsAccTax.com

How to Pay the Internal Revenue Service (IRS) Online

Direct Pay with Bank Account:

- Use the IRS Direct Pay service to pay directly from your checking or savings account at no cost to you.
- You can easily keep track of your payment by signing up for email notifications each time you use IRS Direct Pay.

Pay by Debit Card, Credit Card, or Digital Wallet:

- Taxpayers can make payments online using a payment processor.
- Please note that processing fees apply for credit card, debit card, or digital wallet payments.

Sign In to Your IRS Online Account:

- Sign in using your credentials to make an individual tax payment and view your payment history.

Electronic Funds Withdrawal During E-Filing:

- If you're e-filing your tax return, you can choose to have the IRS directly withdraw the payment from your bank account.

- Apply for a Payment Plan (Installment Agreement):
- If you owe taxes but can't pay the full balance immediately, you can apply online for a payment plan. Fees apply for payment plans, but they allow you to pay off your balance over time.

Offer in Compromise (OIC):

- Check if you qualify for an OIC to settle your debt for less than you owe.

Pay by Check:

Internal Revenue Service

P.O. Box 1214

Charlotte, NC 28201-1214

Remember, it's essential to pay your taxes by the due date to avoid penalties, even if you can't pay the full amount. Explore these options and find the one that best suits your situation

For more information or to schedule a consultation, please contact us
Admin@WilliamsAccTax.com
Visit our site at www.WilliamsAccTax.com

How to Pay Your Georgia Taxes Online

The Georgia Tax Center (GTC) is a secure electronic self-service portal provided by the Georgia Department of Revenue.

Here's how you can use it:

Log in to GTC: If you already have an account, log in to your GTC account.

Make a Quick Payment:

Under "Tasks," click on "Make a Quick Payment."

Review the request details and click "Next."

Select "Business" as the customer type.

Choose the appropriate account type and proceed.

Enter your payment information (you can save it for future use).

Complete the payor information.

Credit Card Payments via GTC:

Note that credit card payments cannot be canceled once submitted.

Convenience fees apply (2.19% with a $1.00 minimum) and are charged per transaction by a third-party vendor.

If you don't have a GTC login, you'll need to provide your SSN or Tax ID when making payments without logging in.

Paper Payment: You can also make your payment via paper:

Enclose your check or money order with the appropriate paper form.

Send it via U.S. Mail following the instructions available on the forms.

Georgia Department of Revenue PO Box 740399

Atlanta, GA 30374-0399

Payment Plans (Installment Agreements): If needed, you can request a payment plan for individual income tax and business/corporate income tax accounts:

Online: Use your GTC account to request a payment plan.

Paper Request: Complete and mail a paper request using Form GA-9465 Installment Agreement Request.

For more information or to schedule a consultation,

please contact us Admin@WilliamsAccTax.com

Visit our site at www.WilliamsAccTax.com

Brandi C. Williams, EA, MAcc

Secure Your Financial Future: Proactive Tax Planning & Advisory Services

Dear Client,

Are you tired of being reactive when it comes to taxes? At Williams Accounting & Tax Services, we believe that the biggest tax savings are found before the year ends. That's why we invite you to take advantage of our specialized **Tax Planning & Advisory** services.

Our advisory services are designed to help you minimize your tax liability, maximize your wealth, and ensure there are no surprises come tax season. We partner with you throughout the year to make proactive, informed financial decisions.

Comprehensive Advisory Services We Offer
Our planning goes far beyond simple tax preparation. We provide strategic, forward-looking financial guidance in several key areas:

1. Income Tax Projections
- **Determine** overall and future tax liabilities.
- **Calculate** approximate tax related to major financial events (e.g., sale of stock, sale of a building, Roth conversion, lump-sum income).
- **Assist** employees in correctly filling out **Form W-4** to elect the optimal payroll tax withholdings.
- **Strategize** to maximize low tax brackets.

2. Estimated Income Tax Payments
- **Calculate and deliver** accurate quarterly estimated tax payments.
- **Recalculate** payments as needed due to changes in income throughout the year.

3. Retirement & Cash Flow Planning
- Perform **cash flow analysis and budgeting** to ensure a secure retirement.
- Provide **proactive tax forecasts** for income earned in retirement.
- Offer **assistance with employer-sponsored tax-advantaged plans**, including 401(k)s, Roth 401(k)s, FSAs, HSAs, and more.

4. Budgeting, Forecasting, and Cash Flow Analysis
- Assistance with **personal budgets and cash flow analysis.**
- Budget creation and cash flow modeling for **businesses.**
- Development of **multi-year business proformas** to evaluate projected financials.

Ready to Begin Your Tax Strategy?
Stop leaving money on the table. Invest in year-round advisory to achieve your financial goals and gain peace of mind.

Tax planning for individuals starts at **$559 per quarter** or **$2,059 annually.**
Tax planning for business owners starts at **$1,059 per quarter** or **$4,059 annually.**

We look forward to partnering with you for a more profitable and secure future.

Sincerely,

The Tax Advisory Team at Williams Accounting & Tax Services LLC

Launch Your Tax Career: Enroll in the Tax Academy Today!

Dear Aspiring Tax Professional and Entrepreneurs,
Are you ready to take control of your financial future and gain a comprehensive, foundational understanding of tax preparation? Williams Accounting & Tax Services is proud to announce enrollment for the highly-anticipated **Tax Academy**!

This is your opportunity to acquire the practical knowledge and confidence needed to accurately prepare tax returns, whether you plan to start a new career or simply manage your own finances with expertise.

What is the Tax Academy?
The Tax Academy is a comprehensive, self-paced training course designed to give you a basic but thorough overview of tax preparation. **No prior tax knowledge is required!**

Key Features & Benefits:

- **Bilingual Format:** The course is offered in both **English & Spanish** to accommodate a diverse group of learners.
- **13-Chapter eBook:** A deep dive into the essentials of the **Form 1040** and all supporting schedules.
- **Flexible Learning:** The course is **Mobile Friendly** and available online with your own personal portal.
- **Practical Application: I**ncludes quizzes, videos, practice tax returns, a practice final exam, and a federal final exam to ensure you are fully prepared.
- **Hands-On Training:** You will prepare practice tax returns, including the option to download PDF scenarios and forms to practice completing returns by hand.

Core Course Content
This program is structured to build your knowledge from the ground up, covering essential topics such as:

- **Overview of Form 1040:** A line-by-line breakdown to establish a clear framework for tax reporting.
- **Filing Status, Dependents, and Deductions:** Learning how to determine the correct filing status and maximize deductions.
- **Income:** Understanding the different types of taxable and non-taxable income and where to report them.
- **Adjustments to Income:** Learning how various expenses can be used to "adjust" or lower a taxpayer's Adjusted Gross Income (AGI).

Ready to Begin?
The future of your financial success starts here. Click the link below to review the full curriculum and enroll in the Tax Academy today!

Enroll Now in the Tax Academy

We look forward to welcoming you to the Academy and guiding you on your journey to becoming a skilled tax professional.

Sincerely,

The Team at Williams Accounting & Tax Services LLC

Williams Accounting & Tax Services LLC

Schedule C Business Organizer — *Tax Year:* ___________

Owner:

Business Name:

1. Business Income

Category	Annual Total ($)
Gross Receipts / Sales (Total cash, checks, and digital payments)	
1099-NEC / 1099-K Reported Income (Provide forms to accountant)	
Returns and Allowances (Refunds provided to customers)	

2. Business Expenses

Expense Category	Total ($)	Expense Category	Total ($)
Advertising & Marketing		Legal & Prof. Fees	
Accounting		Bank Fees	
Contract Labor (1099s)		Office Supplies	
Insurance (Liability, etc)		Rent (Equip/Machinery)	
Interest (Mortgage/Bus. Loan)		Rent (Office/Shop)	
Repairs & Maintenance		Supplies (Materials)	
Professional Fees / Licenses		Utilities	
Payroll Wages		Taxes	
Travel (Air, Lodging)		Business Meals	
Dues & Subscriptions		Other:	
Other:		Other:	
Other:		Other:	
Other:		Other:	
Other:		Other:	
Other:		Other:	
Other:		Other:	

3. Business Use of Vehicle

Year/Make/Model:	**Total Miles:**	**Business Miles:**
Date Put in Service:	**Commuting Miles:**	**Personal Miles:**

Note: IRS requires a written mileage log to support these figures.

4. Business Use of Home

Total Sq Ft of Home:	Home Interest/Rent:	Repairs/Maint:
Sq Ft of Office:	Utilities/Insurance:	Other:

5. Inventory (If Applicable)

Beg. Inventory (Jan 1)		End. Inventory (Dec 31)	
Purchases during year		Cost of Labor/Materials	

Client Attestation: I certify that I have the necessary documentation (receipts, logs, etc.) to support the income and expenses listed above.

Signature: **Date:**

Williams Accounting & Tax Services LLC

Schedule E Rental Property Organizer — *Tax Year:* ____________

Property Information	
Property Address:	
Type (Single Family, Multi, etc):	
Date Purchased:	
Days Rented at Fair Market Value:	
Ownership %:	
Days Personal Use (if any):	

1. Rental Income

Income Category	Annual Total ($)
Rents Received (Total rent collected including arrears)	
Other Income (Laundry, parking, pet fees, forfeited deposits)	

2. Rental Expenses

Expense Category	Total ($)	Expense Category	Total ($)
Advertising		Management Fees	
Accounting		Bank Fees	
Auto & Travel		Mortgage Interest (1098)	
Cleaning & Maintenance		Other Interest	
Commissions		Repairs	
Insurance		Supplies	
Legal & Professional Fees		Real Estate Taxes	
Landscaping / Snow Removal		Utilities (Water, Trash, etc)	
Pest Control		Association Dues (HOA)	
Other:		Other:	
Other:		Other:	
Other:		Other:	
Other:		Other:	
Other:		Other:	

3. Major Improvements (Appliances, Roof, HVAC, etc.)

Description of Improvement	Date Placed in Service	Cost ($)

List items over $2,500 that lasted more than one year.

4. Travel & Mileage

Total Miles Driven (All):	Rental Miles (Only):	Parking/Tolls:

Client Attestation: I certify that I have documentation to support the rental income and expenses reported. I also certify that I have met the requirements for the "Active Participation" or "Real Estate Professional" status if applicable.

Signature: ______________________________ **Date:** ______________________________