



www.learnthelingotax.com
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Taxpayer Name	_____	Spouse Name	_____
Birth Date	_____	Birth Date	_____
Occupation	_____	Occupation	_____
Address	_____	Cell Phone	_____
City	_____	Spouse Cell Phone	_____
State	_____	Zip	_____
Taxpayer Email	_____	Spouse Email	_____

Filing Status:

Single: No Dependents With Dependent(s)
 Someone else can claim me as a dependent

Married: Jointly Separate

Bank Information: Check this box okay to use what we have on file.

Bank Name _____

Confirm Last 4 of Account # _____

If you are a new client, we will request this info via the portal.

Questionnaire:**Yes No**

How did you hear about us? (if new client)

Did you have a change to dependents for 2024?

Are you interested in any of the other services we offer? Bookkeeping Tax Planning Payroll/1099s

Did you have Health Insurance through the Marketplace? (If so, please provide a copy of your 1095-A)

Did you buy or sell any stocks, bonds or other investment property during 2024?

Did you purchase, sell, or refinance your principle residence, second home, or other property?

Did you receive a distribution from or make a contribution to a retirement plan during 2024?

Did you, your spouse, or dependent incur tuition expenses for college, university, or vocational school?

Did you incur any Childcare expenses?

At any time during 2024, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (This includes virtual currency, cryptocurrency and NFTs)

Do you have any foreign assets (bank accounts, brokerage accounts, real estate)?

Did you prepay any 2024 taxes with Estimated Tax Payments? (If so, please send copies of the payments)

If you receive a refund, do you want it deposited directly into the financial institution listed above?

If you owe any tax, do you want it debited directly from the financial institution listed above?

Terms & Conditions:		
Initial	PROMISE TO PAY: You promise to pay our office any and all amounts billed for services rendered. I understand that an estimate of fees will be communicated to me before work is started.	
Initial	REVIEW & SIGNATURE: I understand that Learn the Lingo, LLC will provide a draft copy of my return to me that I will review for any discrepancies. Once I have approved, I will sign the necessary documents provided by Learn the Lingo, LLC to finalize the filing of my return.	
Notes: (Please use this section to add any additional comments or to clarify any “Yes” answers above.)		
<p>I permit Learn the Lingo, LLC (hereafter referred to as “tax preparer”) to review and analyze taxpayer personal and/or business records and documentation. I understand all information will remain strictly confidential and under no circumstances will any of the provided information to a third party, unless written consent supplied by myself or any representative authorized by me on my behalf. I understand that the tax preparer can decide not to prepare taxes at any time if they believe information is fraudulent in any manner. I understand and agree to furnish true, accurate, and complete records and documentation for the purpose of preparing taxes. It is understood that the tax preparer will not be held responsible or liable for any tax penalties or fees as a result of my actions.</p> <p>By signing below, the tax preparer has been released from any legal obligation or representation resulting from untrue or inaccurate information. The information provided is true and correct to the best of my knowledge and I have adequate records of the information provided. I acknowledge and agree to these terms and conditions. I also acknowledge my electronic signature validates and executes the acceptance of the terms as my physical signature also would.</p>		
Signature	Date Signed	