

**CLIENT INFORMATION SHEET****TAX YEAR 2023****YOUR INFORMATION**

Your Full Name (Husband on a Joint Return)

Social Security Number

Birth Date

Occupation in 2023

**SPOUSE'S INFORMATION**

Spouse's Full Name

Social Security Number

Birth Date

Occupation in 2023

**ADDRESS & CONTACT INFORMATION**

Mailing Address

City

State

Zip

Physical Address (If different, or if Mailing Address is a P.O. Box)

City

State

Zip

Your Cell Phone

Spouse's Cell Phone

Your Email (Required)

Spouse's Email

**FILING STATUS**

Marital status on December 31, 2023

 Single  Married

If married, did you live apart from your spouse during the last 6 months of 2022

 Yes  No

By answering "Yes," you are confirming that if requested by the IRS, you can provide documentation that verifies your spouse did not live with you during the last 6 months of the year, such as a lease agreement, utility bills, a letter from a clergy member, or a letter from social services.

Can you be claimed as a dependent on someone else's tax return?

 Yes  No

Did you pay for over half the cost of keeping up your home during 2023?

 Yes  No

Upkeep expenses include rent, utilities, food eaten in the home, mortgage interest, real estate taxes, and insurance on the home. If you use payments you received under any public assistance program to pay for part of the cost of keeping up your home, you cannot count them as money you paid. However, you must include them in the total cost of keeping up your home to figure if you paid over half the cost.

By answering "Yes," you are confirming that if requested by the IRS, you can provide documentation that verifies you paid for over half the cost of keeping up your home, such as rent receipts, utility bills, grocery receipts, and other household bills.

**DEPENDENTS** (Do not include you or your spouse)

First Name	Last Name	Birth Date	Social Security Number	Relationship to You	# of Months Lived with You in 2023

If requested by the IRS, what documentation can you provide that shows evidence of the relationship between you and each of your dependents listed above (birth certificates, marriage certificates, court documents, letters from authorized placement agencies, etc.)?

If requested by the IRS, what documentation can you provide that shows evidence that each of your dependents lived with you for the number of months stated above during 2022 (school, medical, childcare provider, social service records, etc.)?

## Healthcare Coverage Information

At **anytime** during 2023 did you, your spouse, or any of your dependents have insurance through the HealthCare Marketplace?

Yes      No

If yes, we **must** have form **1095A** from the Marketplace to prepare your tax return.

## Refund and Payment Options

Direct Deposit all Refunds?      Yes      No, I want to receive a check in the mail

Bank Draft any Balances Due      Yes      No, I will mail a check or make arrangements for the balance due  
For Draft or Direct Deposit, please provide your bank information. If same as last year check here

Name of Bank \_\_\_\_\_ Type of account:      Checking      Saving

Routing Number \_\_\_\_\_ Account Number \_\_\_\_\_

## DURING 2023, DID YOU OR YOUR SPOUSE...

Live or work in any other states? If yes, please explain.

### Receive any of the following:

Wages or salaries  
Unemployment compensation  
Social Security benefits  
Self-employment income or 1099 NEC  
Pension, annuity, IRA, or retirement  
Interest or stock dividends

### Pay any of the following:

Daycare Expenses  
Home Mortgage Interest  
Real Estate Taxes  
Student Loan Interest  
College Tuition  
IRA Contributions

### Do any of the following:

Purchase or rent any property without paying state sales tax  
Receive, sell, send, exchange, or otherwise acquire or dispose of any financial interest in **virtual/cyrpto type currency**  
(example: BitCoin)  
Have interest or signature authorization on any financial accounts in **foreign** countries

## TERMS OF OUR ENGAGEMENT

Thank you for choosing Janet Tart, EA 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 prepare your federal and state income tax returns. We will depend on you to provide the information we need to prepare complete and accurate returns. We may ask you to clarify some items but, will not audit or otherwise verify the data you submit. Your information provided will contribute to efficient preparation of your income tax returns and help minimize the cost of our services. If all of the information is not provided at the time of service, additional costs may be incurred.

We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations 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. Tax preparation does not include bookkeeping services. You are required to provide totals for all expenses and deductions on your returns. Extra fees will be incurred if we are required to total receipts to prepare your returns.

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 standard billing rates plus out-of-pocket expenses. Fees are due before the tax return is signed. Tax returns will not be electronically e-filed or released for mailing until fees are paid in full. All invoices are due and payable upon presentation. To the extent permitted by state law, an interest charge of 18% may be added to all accounts not paid within fifteen(15) days of the invoice date.

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 the items may later be needed to prove accuracy and completeness of a return. You will be provided with a copy of your return, either in paper or digital form. You should keep your copy. A copy retrieval fee of twenty five dollars (\$25) (per tax year) will be charged if we provide copies of a return after this engagement ends. We will retain records related to this engagement for three years, after which we are free to destroy our records related to this engagement.

In the event of a complaint related to the services we provide, we agree to discuss the complaint, and if necessary, to take action in a good faith effort to resolve the complaint. Additional fees may be incurred for representation of your interest with the federal or state taxing authorities, if it becomes necessary after your returns have been filed. This includes responding to letters received, audits, etc. If we make an error on your tax return, and it is discovered after the return has been filed, we will pay any initial penalties and interest that result from that mistake. We are not responsible for additional taxes that may be required due to an error. Our engagement to prepare your tax returns will conclude with the delivery of the completed returns to you (if paper-filing), or your signature and our subsequent submittal of your tax return (if e-filing). 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. By signing below you agree to the terms of this agreement as here stated, give permission for us to discuss your return with the taxing authorities as needed, and give permission for us to contact you via telephone, text, and email communication.

In addition, by signing below you declare that the information provided on the attached intake form is true and accurate.

Your Signature

Spouse's Signature

Date