Audibert, Bissonnette & Co., LLC
102 Wolcott Rd, Wolcott, CT 06716 Phone: 203-879-4329 Fax: 203-879-7842

CLIENT DROP-OFF WORKSHEET

Today's date: __________________ If over 65 [ ] or a veteran [ ] check to receive a discount

Name: ____

Address: ____

Home #__________________________________ cell #__________________________________

Email: ____ fax # ________________________

Did you receive, sell, send, exchange or otherwise acquire any financial interest in any **virtual currency?** Yes or No **(Circle One please)** If yes, please give us the details.

Do you have any **foreign financial assets?** Yes or No If yes, please give us the details.

Amount received in **economic stimulus payments**? **1st**: $____________ **2nd**: $______________

Did you take a retirement account distribution related to Covid or a natural disaster? ___________

Do you have dependents who must file?____ If yes, do you want us to prepare their return?_____

If you had health insurance from CT Access Health, you must provide us with your **Form 1095-A**

How would you like your client copy? E-mail [ ] Paper [ ]

Would like your refund (if any) **directly deposited**? Yes / No
If Yes, if it's the same account as last year, check here: [ ] If new acct, attach a voided check.

For Schedule C businesses:
Did you obtain a **PPP** loan? How much? ______________ Do you expect this loan to be forgiven?
Were you required to file any 1099-NEC and/or 1099-MISC forms?____If Yes, did you file them?
Please give us business miles and total miles for the year if you have business use of auto.

Remember to give us, if applicable**: Donations -** there is a new deduction up to $300 for contributions even if the standard deduction is taken. Car Taxes. Estimated tax payment amounts and dates paid. Purchase price and date (cost basis) for any stock sales. Closing documents for real estate purchases or sales. Daycare expenses. IRA contributions made. All K-1's received. For contributions made to a CHET, please give us the amount, account name and account number.

Many tax forms are no longer mailed, instead you have to go on-line to obtain. These include: **1098-T** for tuition, **1099-G** for Unemployment Compensation, **1099-SA** for HSA accounts, **Consolidated 1099** investment account reports, and **1098-E** student loan interest.

Remember, incomplete information will delay processing!

Please give us **ALL** the tax forms you have received in the mail or obtained on-line.

PLEASE READ AND SIGN THE NEXT PAGE

Tell us about any changes from last year, for example filing status, dependents, etc.

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PLEASE NOTE: By signing below, you confirm your understanding of the terms of our agreement and the nature and extent of the services we will provide. Based on the information you give us, we will prepare your federal and applicable state income tax returns. We will not audit or otherwise verify the data you submit, although we may ask you for clarification when necessary. All the information you give us will, to the best of your knowledge, be correct and complete and include all information necessary for the completion of your tax return. We will also prepare any required estimated tax vouchers. If you anticipate a substantial change in income or withholding taxes for the next tax year, please advise us as soon as possible. We will then determine whether an adjustment should be made to your tax estimates. Your returns are subject to review by the taxing authorities. Any items that may be resolved against you by the examining agent are subject to certain rights of appeal. In the event of an examination, we will be available upon request to represent you, or to review the results of any examination. Billing for these additional services will be at our standard rates. You should retain all the documents, canceled checks and other data that support your reported income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the returns, so you should review them carefully before signing for them. The charges for our services are based on our fee schedule and the complexity of the returns.

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Taxpayer Signature

PRIVACY POLICY: The privacy of your client information has always been important to us, and we have always been bound by professional standards of confidentiality. We collect nonpublic personal information about you that is provided by your or obtained by us with your authorization. This information may come from various sources, including information we receive from personal interviews, phone calls, e-mails, worksheets, and other documents necessary to provide professional services to you. We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as permitted by law or when necessary to process transactions requested by a client. We restrict access to nonpublic personal information about you to members of our firm who need to know that information in order to provide you with professional services. We retain records relating to the professional services that we provide you in accordance with accounting and governmental standards. We employ physical, electronic, and procedural security safeguards to protect your nonpublic personal information. Your confidence and trust are important to us. If you have any questions or concerns regarding the privacy of your nonpublic personal information, please contact us.

We are required to **electronically file** your tax return. E-filing provides faster refunds and is more accurate. However, if you do ***not*** want to E-file, please see the receptionist for an opt-out form.

⇒ **All** personal income tax return invoices are **due and payable upon presentation** unless otherwise arranged with us. If we do extend credit to you, in the event of non-payment, you will be responsible for any legal fees incurred by us in collection of the debt. For your convenience, we accept **MasterCard, Visa, Amex, checks or cash.**