

Audibert, Bissonnette & Co., LLC

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NEW CLIENT DROP-OFF WORKSHEET

Today's date _____ If over 65 [] or a veteran [] (check to receive a discount)

Taxpayer: _____ SS# _____ DOB _____

Spouse: _____ SS# _____ DOB _____

Home phone: _____ Cell phone: _____

Email: _____ Fax: _____

Address: _____

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.

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.

List dependents (if over 18, please indicate if full-time student or disabled)

<u>Name</u>	<u>SS#</u>	<u>Birthdate</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

*****Did you remember to bring a copy of last year's return?*****

PLEASE READ AND SIGN THE NEXT PAGE

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

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.

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.

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 you 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.

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⇒ **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.**