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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 buy health insurance from CT Access Health (or other Obamacare marketplace)? If Yes, you must provide us with your Form 1095-A in order to prepare your return.

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 / No

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

Would like your refund (if any) directly deposited? Yes / No (If Yes, we will need a copy of a voided check for routing transit and account numbers.)

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)

Name	SS#	Birthdate

Any **dependent care expenses**? List name, address & TIN of daycare provider & amount paid per child:____

If you have **children who work,** are you claiming them, or are they claiming themselves?_____

For Schedule C businesses and Schedule E rental properties Owners:
Did you make any payments that would require you to file Form 1099? Yes / No
If Yes, did you file all required Forms 1099? Yes / No

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

PLEASE READ AND SIGN THE NEXT PAGE

<u>DID YOU REMEMBER</u> to give us: Donations? Car Taxes? Estimated tax payment amounts and dates paid? Business and total mileage? Purchase price and date (cost basis) for any stock sales? Closing documents for real estate purchases or sales? IRA contributions made? Medical Insurance Forms? All K-1 forms received?

Many tax forms are no longer mailed and you may have to go on-line to obtain. These can include **1098-T** for tuition, **1099-G** for Unemployment Compensation, HSA form **1099-SA**, brokerage account **Consolidated 1099 report** for dividends, interest & stock sales, and **1098-E** student loan interest.

Anything else we should know?

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<u>PLEASE NOTE</u>: We will prepare your federal and state income tax returns from the information that you provide to us. We may ask for clarification of some items, but we will not audit or otherwise verify the data you submit. It is your responsibility to provide all the information required for the preparation of complete and accurate returns. 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 are responsible for the returns, so you should review them carefully before signing them. Our work will not include any procedures to discover defalcations or other irregularities. The only accounting or analysis work we will do is that which is necessary for preparation of your income tax returns. We must use our judgement in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authorities' interpretations of the law and other supportable positions. In order to avoid penalties, we will apply the "more likely than not" reliance standard to resolve such issues. You agree to honor our decisions regarding the need to make protective disclosures in your returns. Tax laws require specific documentation for travel, entertainments, automobile mileage and expenses, and charitable contributions. You need to have all required documentation in your files. Your returns may be selected for audit by a taxing authority. Any proposed adjustments are subject to appeal. In the event of a tax examination, we can arrange to be available to represent you. Such representation will be a separate engagement. Fees and expenses for defending the returns will be invoiced in accordance with terms we agree on for that engagement. Our fee for preparation of your tax returns will be based on the amount of time required. **<u>All invoices are due and payable</u> <u>upon presentation.</u>** 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. We will retain copies of certain records you supplied to us along with our work papers for your engagement for a period of seven years. After seven years, our work papers and engagement files will be destroyed. All of your original records will be returned to you at the end of this engagement. You should keep the original records in secure storage. Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to any third party without your express permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access. However, we cannot be responsible for any loss or damage to any person or entity from the use of e-mail or other forms of electronic data transmissions in the completion of or transmission of your completed tax returns.

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Taxpayer Signature

Please give us **<u>ALL</u>** the tax forms you received or obtained on-line, as incomplete information will delay processing.

All personal income tax returns are **due and payable upon pick-up** unless otherwise arranged with us. We accept MasterCard, Visa, American Express, checks or cash.