

Taxpayer: _____ Date of Birth: _____ SS Number: _____
 Spouse: _____ Date of Birth: _____ SS Number _____

Dependents

<i>Name</i>	<i>Date of Birth</i>	<i>Social Security Number</i>	<i>Grade in School (12/31/25)</i>

Any changes in family for 2025?

Marriage/divorce/separation? Provide event and date: _____

Any death in the family? Provide a copy of death certificate: _____

Did you move during 2025? Please provide the new address and date of move.

New address: _____ Date of move: _____

Bank information for direct deposit of refund:

Routing number: _____ Account Number: _____

Foreign Income and Foreign Accounts Information

Do you own or have financial interest in a foreign bank or financial account? If yes, please provide copies of year-end statements for each foreign account. If you have income from a foreign source, please provide documentation of such income.

Provide the following documents for income and deductions:

Form W-2	1099-INT	1099-DIV
1099-R	1099-MISC	1099-NEC
1099-K	1098-T	SSA-1099
Form W-2G	1099-G	1099-SA
5498	1095-A	1099-B
Daycare provider statement including Taxpayer ID	List of income not shown on a tax form	Any other tax document showing income or expenses

Any of the following changes during 2025 (provide documentation for each item):

Pay interest on a new car loan purchased after 2024?: _____

Purchase health insurance through a public exchange (1095-A)? _____

Purchase an energy-efficient, hybrid, or electric vehicle? _____

Any child(ren) attending college (1098-T) ? _____

Pay tuition to a private school for a dependent (provide statement)? _____

Pay child care expenses so taxpayer and spouse could work (provide statement from provider)? _____

Did you, or will you, contribute to an IRA or Roth IRA (Form 5498) ? _____

Rollover funds from a retirement account (Form 1099-R)? _____

Sell or transfer stock or real estate (Form 1099-B)? _____

Were you given any stock options? _____

Own, buy, or sell any digital assets (cryptocurrency, NFTs, etc.)? _____

Involved in a bankruptcy, repossession, or cancelled debt? _____

Contribute to a charity? Cash amount: _____ Non-cash amount: _____

Did you purchase or sell your primary residence? _____

Make any energy-efficient improvements you're your home? _____

Make estimated payments for 2024 taxes? Provide copies of cancelled checks or screenprints from online payments for the IRS and each state payments were made to. _____

Operate a small business or rental property? _____

Receive unemployment compensation (Form 1099-G)? _____

Receive any gambling winnings (Form W2-G)? _____

Have any gambling losses (must be detailed record of wagers)? _____

Were you a K-12 educator for 2024? _____

Did you make contributions to an HSA Account (Form 5498-SA)? _____

Did you take a distribution from an HSA Account (Form 1099-SA)? _____

General Engagement Letter for Tax Preparation

- You agree to provide all income and deductible expense information. If you receive additional information after we begin working on your tax return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have the required supporting written records. In some cases, we will ask you to review your documentation.
- You must be able to provide written records of all items included on your tax return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the tax returns carefully before signing to make sure the information is correct.
- Fees must be paid before your tax returns are filed. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer may be required for preparation of returns.
- You understand your obligation to keep a copy of your tax return, either in digital or paper form and that you will incur a fee for requesting an additional copy. IRS guidelines suggest keeping copies for seven years.
- You understand that signing the electronic filing form is the same as signing the actual tax return and that you are signing under penalties of perjury.
- Preparation fees do cover limited assistance and consultation during the year. Additional services will incur additional fees.
- This engagement does not include bookkeeping or audit of your books and records. In the event your tax return is audited, you will be responsible for verifying the items reported. Keep your records with a copy of your tax return.
- Fees charged for tax return preparation do not include audit representation.

Signatures. By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities in preparing your tax returns. For a joint return, both taxpayers must sign. You are also acknowledging that you have provided all information on you digital asset holdings and transactions.

Taxpayer

Spouse

Date

Privacy Policy. The nature of our work requires us to collect certain nonpublic persona information about you from various sources. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

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 written 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. Please contact us with any questions regarding our privacy policy.