

Keenan Tax Service

2024 Tax Organizer

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

Dependents

Name *Date of Birth* *Social Security Number* *Grade in School (12/31/24)*

<i>Name</i>	<i>Date of Birth</i>	<i>Social Security Number</i>	<i>Grade in School (12/31/24)</i>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Any changes in family for 2024?

Marriage/divorce/separation? Provide event and date:

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

Did you move during 2024? 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 2024 (provide documentation for each item):Pay or receive alimony? Provide name and amount: 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 charge 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.

*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.