TOWLE PROFESSIONAL TAX SERVICES    314 Rosemary Drive, Pulaski, WI 54162 (920) 619-6548

# CLIENT INFORMATION FORM

***THE FOLLOWING INFORMATION MUST BE SUBMITTED WITH YOUR DOCUMENTS:***

- **THIS COMPLETED FORM WITH SIGNATURE AND DATE**
- **A COPY OF DRIVERS LICENSE(s) OR STATE ID(s)** *(you can email or text me a copy of this information)*
- **A COPY OF YOUR LAST YEAR'S RETURN** *(New Clients Only)*
- **ALL SUPPORTING FORMS & DOCUMENTS** *(Check boxes below)*

**NAME** FIRST MI LAST _________________________________ **SPOUSE** FIRST MI LAST __________________________________

**SSN** ____________________ **BIRTHDATE** ____/____/______ **SSN** ____________________ **BIRTHDATE** ____/____/______

**ADDRESS** (City State Zip) ___________________________________________________ **PHONE** _________________________

**EMAIL** ____________________@__________.______ **How do you want to be contacted: Email ___ Text ___ Phone ___**

**How many months did you and your Spouse live together? _____________**

| **LIST ALL DEPENDENTS**<br>**First Name, Middle Initial, Last Name** | **Birth Date** | **SSN** | **Relationship** | **Months Lived w/you** |
|---|---|---|---|---|
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- If your **child did not live with you** but is claimed as your dependent, do you have permission to claim your child as a dependent for this year check here? **Yes / No**
- Will someone else claim **YOU** as a **Dependent** this year? **Yes / No**
- Did you **PAY** or **RECEIVE** Alimony $__________________________ Recipient's SSN __________ ______ ___________
- What year was your divorce finalized? ___________ Recipient's Name ______________________________________

**CHECK THE INCOME ITEMS WHICH PERTAIN TO YOU * BRING ALL OF THESE SUPPORTING FORMS WITH YOU**

| | | | |
|---|---|---|---|
| Wage Statement (W-2) | | Lottery or Gambling Winnings (W2-G) | |
| Unemployment Compensation (1099-G) | | Childcare Credit (Form 2441) | |
| SSA-1099, SSA-1099-SM, or 1040-SR | | Child Tax Credit (Form 8812) | |
| 1099-NEC or 1099-MISC | | Self-Employed Business Income & Expenses | |
| Pension, Retirement Income (1099-R) | | Partnership/S Corp (K-1) | |
| Stock Sales (1099-B) | | Education Expenses, Higher Ed. Expenses, Student Loans | |
| 1098, Property Tax Bill | | Income from Rentals | |
| Interest Income (1099-INT) | | Health Savings Account (HSA) | |
| Dividends (1099-DIV) | | Did you purchase Energy Saving Home Improvements? | |
| Estates or Trusts (5498) | | Did you buy or sell personal residence or rental property? | |
| Tips, Other Income | | Proof of Health Insurance (1095-A) | |

**Yearly total you paid for Health Insurance? $_____________** *(This will be used to calculate a deduction for State)*

**What did you pay monthly for Rent $______________** *(This will be used to calculate a deduction for State)*

**Please check: Do you want any REFUND sent as:** DIRECT DEPOSIT ______ US MAIL (Check) ______

**Please provide the following information for DIRECT DEPOSIT**

Name of your Financial Institution ________________________________________________________________________

Routing # _______________________ Account #__________________ Type of Account: Savings _____ Checking _____

# INCOME TAX PREPARATION SERVICE AGREEMENT

We appreciate the opportunity of working with you and advising you regarding your federal and state individual income taxes. To ensure an understanding of our mutual responsibilities, we ask all our clients for whom returns are prepared to confirm the following arrangements:

**1.** We will prepare your federal and state individual income tax returns. **These returns will be prepared from information which you will furnish us with. We will not audit or make any other verification on the data you submit, although it may be necessary to ask you for clarification of some of the information.** We will provide you with an online checklist to help you in gathering the necessary information (please note, this list is not comprehensive, and any forms you are unsure about should be submitted to us prior to us preparing your tax returns). **In the event of an audit by a taxing authority, you will be required to provide the documentation for all items in question to the taxing authority. It is the taxpayer's (you) responsibility to obtain/retain all documentation that supports your tax liability.**

**2.** It is your responsibility to provide all the information required for the preparation of a complete and accurate tax return. You should retain all documents, cancelled checks, and other data that form the basis of income and deductions for at least the period of the statute of limitations (typically 3 years, but can be unlimited in certain situations). You should also retain documents that support items carried over into open years, such as cost basis information, nondeductible IRA's, net operating losses, etc. This information may be necessary to prove the accuracy and completeness of the returns to a taxing authority. If, for some reason, you believe your returns have not been received by the taxing authorities, (i.e., you didn't get your refund, they haven't cashed your check, etc.) then please contact us.

**3.** Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover errors or omissions by you for fraud, misrepresentations, defalcations, and/or other irregularities, should any exist. We will provide such accounting and bookkeeping assistance as determined to be necessary only for the preparation of your income tax returns. **It is your responsibility to provide us with accurate, truthful information for use in preparing your tax returns.**

**4.** We will use our professional judgment in resolving questions where the tax law is unclear, or where there may be conflicts between the taxing authority's interpretation of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.

**5.** The law provides various penalties that may be imposed when taxpayers understate their tax liability. The Internal Revenue Service also imposes penalties upon taxpayers and return preparers for failure to observe due care in reporting for income tax returns.

**6.** Your returns may be selected for review *for any reason* by the taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such a government tax examination, we will be available upon request to help you resolve these issues. However, such assistance is not included in your Tax Preparation Fee, and we will render additional fees for the time and expense incurred on a case-by-case basis. Moreover, the taxing authorities may correspond with you regarding your tax return. You agree to timely forward this correspondence to us for review and analysis. Additional fees may be charged depending upon the response required. We do not professionally participate in the audit.

**7.** Our fees are based upon a standard rate schedule for the type of forms required to be filed. You will never be charged additional fees. Payment for services is due prior to us filing your taxes. Payment Agreements are available upon request. Payment can be made in the form of cash, check, MasterCard, Visa, and American Express (no processing fee added).

**8.** Unless otherwise specified by you in writing (email is sufficient), we will create/generate a PIN for you that will be used as your Signature on your tax forms (only applies to electronically filed tax forms – As a Licensed Tax Preparer, ALL returns prepared MUST be e-filed).

If you are in agreement with the above information, please sign in the space indicated. Thank you for your trust in our professional tax preparation services.

Kathy Kennedy-Towle, RTRP
Robert Delvaux
DBA **Towle Professional Tax Service**

Acknowledged,

____________________________________________________________________________

Your Signature Date

***Please use this space or another sheet of paper for additional information you want to submit***