

DATE RECEIVED

HINSHAW CPA OFFICE
CLIENT INTAKE FORM

TAXPAYER	SPOUSE
First Name _____	First Name _____
Last Name _____ Suffix _____	Last Name _____ Suffix _____
Phone / Cell _____	Phone / Cell _____
Email _____	Email _____
Drivers Lic # _____ State _____	Drivers Lic # _____ State _____
Issued _____ Expires _____	Issued _____ Expires _____
UPDATE INFORMATION BELOW IF IT HAS CHANGED	UPDATE INFORMATION BELOW IF IT HAS CHANGED
Address _____	Address _____
Occupation _____	Occupation _____
Are YOU Claimed as Dependent? YES NO	Are YOU Claimed as Dependent? YES NO
Date of Birth _____ Disabled/Blind? _____	Date of Birth _____ Disabled/Blind? _____
SSN _____	SSN _____

DEPENDENT INFORMATION				
Name	Months in Home in 2023	Relationship	Date of Birth	SSN

PROVIDE REFUND OR PAYMENT INFORMATION		
Please check box if NO CHANGE to your bank information from 2023:	REFUND Check OR Direct Deposit	BALANCE DUE Check OR Bank Debit
Bank Name _____ Checking Acct OR Savings Acct (Please Circle)		
Bank Rtg # _____ Bank Account # _____		

Include all INCOME documents. For example:	Include all DEDUCTIONS and EXPENSES . For example:
* Wages	* Mortgage Interest
* Non employee compensation	* Real Estate Taxes
* Unemployment	* Charitable Contributions
* Retirement / Pension	* Medical
* Social Security	* Alimony Payments
* Interest / Dividends	* Education Exp (K-12 / College)
* Gambling	* Business Expense
* Alimony Received	* Rental Expense
* Investment Income	* Farm Expense
* Business Income	* Health Savings Account
* Rental Income	* IRA Contribution
* Farm Income	* Daycare Expense

ANSWER THESE QUESTIONS	(1) Do you have any outstanding Tax Notices? NO YES (PLEASE ATTACH) (2) At anytime in 2023, did you receive, sell, send, exchange, or otherwise acquire any financial interest in Virtual Currency ? NO YES
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To the best of my knowledge, the enclosed information is correct and includes all income, deductions, and other information necessary for the preparation of this year's income tax returns for which I have adequate records.

Initial:

Date:

Tax Engagement Letter

Dear Client,

Thank you for choosing our firm to prepare your income tax returns for the 2023 tax year. This letter is to confirm and specify the terms of our engagement with you and to clarify the nature and extent of the services we will provide. In order to ensure an understanding of our mutual responsibilities, we ask all clients for whom returns are prepared to confirm the following arrangements.

We will prepare your 2023 federal and state returns from information which you will furnish to us. We will not audit or otherwise verify the data you submit, although it may be necessary to ask you for clarification of some of the information. We will furnish you with questionnaires and worksheets to guide you in gathering the necessary information, if requested.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all the documents, cancelled checks and other data that form the basis of 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 income tax returns and, therefore, you should review them carefully before you sign them.

Our work in connection with the preparation of your income tax returns does not include any procedures designed to discover defalcations and/or irregularities, should any exist. We will render such accounting and bookkeeping assistance as determined to be necessary for preparation of the income tax returns.

The law provides various penalties that may be imposed when taxpayers understate their tax liability. If you would like information on the amount or the circumstances of these penalties, please contact us.

Your returns may be selected for review by taxing authorities. Any proposed adjustments by the examining agent are subject to certain rights of appeal. In the event of such governmental tax examination, we will be available upon request to represent you. Our fees for preparing your returns do not include time or expense that might be necessary to assist you during a taxing authority review.

Our fees for these services will be based upon the amount of time required at standard billing rates plus out-of-pocket expenses. All invoices are due and payable upon presentation.

If this letter accurately sets forth your understanding, please sign the enclosed copy of this letter in the space indicated and return it to our office. However, if there are other tax returns you expect us to prepare, please inform us by noting so at the end of the return copy of this letter.

We want to express our appreciation for this opportunity to work with you.

Sincerely,

Hinshaw CPA Office LLC

Please check this box if you agree to the terms of the engagement letter.

Date _____

Notes: