HINSHAW CPA OFFICE **CLIENT INTAKE FORM**

TAXPAYE	SPOUSE						
First Name		First Name					
Last Name	Last NameSuffix						
Phone / Cell	Phone / Cell						
Email		Email					
Drivers Lic #		Drivers Lic #State					
Issued Exp	oires	Issued Expires					
UPDATE INFORMATION BELO		UPDATE INFORMATION BELOW IF IT HAS CHANGED					
Address		Address					
Occupation		Occupation	Occupation				
Are YOU Claimed as Dependent?	YES NO	Are YOU Claimed as Do	Are YOU Claimed as Dependent? YES NO				
Date of Birth	Date of Birth Disabled/Blind?			Date of Birth Disabled/Blind?			
SSN		SSN					
	ADD DEPEND	DENT INFORMATION					
Name	SSN	Relationship	Date o	of Birth	Months in Home		
	PROVIDE REFUND O	R PAYMENT INFORMATI	ON				
Please check box if NO CHANGE to your		REFUND		BALANCE DUE			
bank information from 2023:		Check OR Direct	Deposit	Check	OR Bank Debit		
ank Name	Checking A	Acct OR	Savings A	acct (Please Circle)			
Dank Dta #		Pank Assaunt #					
Bank Rtg # Include all INCOME docum	Bank Account # Include all DEDUCTIONS and EXPENSES. For example:						
* Wages	* Gambling	* Mortgage Interest		•			
* Non employee compensation	* Alimony Received			* Rental Expense			
* Unemployment	* Investment Income	* Charitable Contributions		* Farm Expense			
* Retirement / Pension	* Business Income	* Medical		* Health Savings Account			
* Social Security	* Rental Income	* Alimony Payments		* IRA Contribution			
* Interest / Dividends	* Farm Income	· ' '		* Daycare			
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						
To the best of my knowledge, the							
other information necessary for the	ne preparation of this yea	r's income tax returns fo	or which I h	ave adequa	te 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,

	Hins	haw	CPA	Of	fice	LLC
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	Please check this box if you agree to the terms of the engagement letter.
Date	
Notes:	