

CLIENT ORGANIZER
TAX YEAR 20__ __

Thank you for choosing _____. We appreciate the opportunity to help you with your taxes. This letter gives your approval for _____ to prepare your Federal and State income tax returns and, if you choose, to transmit your return electronically through an approved bank application for purposes of obtaining your refund.

This easy-to-use organizer has been prepared to assist you in collecting information for your Individual Income Tax Return for previous year.

We may ask you to **clarify** certain information or provide proof for accuracy during the preparation process as required by the IRS. You are responsible for the accuracy, completeness and supportability of any information we submit for you to the IRS, any state or any bank. You will be responsible to maintain all backup papers that may be used in any reviews by the IRS.

We will prepare your tax return based only on the information you provide to us. Please provide all records and necessary information requested, including:

******WHAT YOU NEED TO BRING******

- **Copy of Social Security Card & 1 picture ID for each taxpayer (ie. Driver's License or State ID) this includes copies of Social Security Cards for each dependent, if applicable**
- **Copy of Birth Certificates for you and dependents, if the dependent is not your child**
- **Court or agency documents of guardianship for dependents other than your child**
- **W-2s for wages, salaries, tips, and pensions**
- **1098Ts for Tuition and Fees paid to Colleges or Universities**
- **1098s for mortgage interest paid to financial institutions**
- **1099s for Business Income or interest, dividends, state tax refunds, and other payments**
- **Form 1095A Health Insurance Statement from the Market Place**
- **Form 1095B or 1095C Proof of insurance from employer or government provided health insurance**
- **Additional correspondence from tax agencies, if any**

Using this organizer will assist you in compiling complete and accurate tax data that will make it possible to take full advantage of all allowable deductions and give you your maximum refund.

FEES

Our preparation fee depends on how complicated your taxes are. Therefore, based on how many forms and schedules you require, the cost per form or schedule will vary. Your final bill may differ from any fee estimates. Before you sign your federal and state forms, we will provide you our total billing. Here is some general billing information you should know.

- You must pay all fees including any unpaid prior year fees before we submit the forms to the IRS and State Bureau of Revenue unless you apply for a Refund Transfer.
- If you qualify for a RT or Advance, our banking partner will deduct from your RT or Advance
 - _____ tax preparation fees
 - Banking, & other transmission related fees
 - If our bank does not receive payments for your RT or for any other reason it does not forward our preparation fee to us, you will **STILL be liable and MUST pay all fees directly to our office immediately upon notification by**

Contact us as soon as possible to schedule an appointment to prepare your taxes, however walk-ins are welcome.

Client's Name/Signature

DATE