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**
- **COPY OF DRIVERS LICENSE OR STATE ID (**this can be copied when you bring in your taxes)
- **A COPY OF YOUR LAST YEAR'S RETURN** (New Clients Only)
- **ALL SUPPORTING FORMS & DOCUMENTS**

FULL NAME ____ **SPOUSE NAME** ____

SSN ___________________ **BIRTHDATE** ______________ **SSN** ______________________ **BIRTHDATE** ______________

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

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

LIST ALL DEPENDENTS **First Name, Middle Initial, Last Name**	**Birth Date**	**SSN**	**Relationship**	**Months Lived w/you**

- 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 $____________ per year What year was your divorce finalized? _______

  Recipient's Name & SSN _____________________________________ ______________________________

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

Wage Statement W-2		Lottery or Gambling Winnings	
Unemployment Compensation 1099G		Childcare Credit Form 2441	
Social Security/Railroad Retirement?		Child Tax Credit Form 8812	
1099 NEC OR MISC		Self-Employed Business Income	
Pension, Retirement Income?		Education Expenses, Higher Ed. Expenses, Student Loans	
Stock Sales		Income from Rentals	
Municipal Bonds		Did you buy or sell personal residence or rental?	
Interest Income 1099-INT?		HSA Health Savings Account	
Dividends 1099-DIV?		Did you purchase Energy Saving Home Improvements	
Estates/Trusts		Did you invest or sell Bitcoin?	
Tips/Other Income		Did you make purchases online that you did not pay tax?	

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 REFUND by DIRECT DEPOSIT ______ or by US MAIL _____

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

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

1. I will prepare your federal and state individual income tax returns. **These returns will be prepared from information which you will furnish to me. I 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.** I will furnish 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 me prior to me preparing your tax forms). **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. <u>It is the taxpayer's (you) responsibility to obtain/retain all documentation that supports your tax liability.</u>**

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 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., didn't get your refund or they haven't cashed your check) then please contact me.

3. My work in connection with the preparation of your income tax returns does not include any procedures designed to discover errors or omissions by you, fraud, misrepresentations, defalcations and/or other irregularities, should any exist. I will render 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 me with accurate, truthful information for use in preparing your tax forms.**

4. I will use my 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, I 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 government tax examination, I will be available upon request to help you resolve these issues. However, such assistance is not included in your tax preparation fee <u>and I will render additional fees for the time and expense incurred on a case by case basis</u>. Moreover, the taxing authorities may correspond with you regarding your tax return. You agree to timely forward this correspondence to me for review and analysis. Additional fees may be charged depending upon the response required. <u>I do not professionally participate in the audit</u>.

7. My 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 me filing your taxes. Payment Agreements are available upon request. Payment can be made in the form of cash, check, MasterCard or Visa, American Express (no processing fee added).

8. Unless otherwise specified by you in writing (email is sufficient), I 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. And thank you for your trust in my professional tax preparation services.

Kathy Kennedy-Towle, RTRP
Towle Professional Tax Service/Owner

Acknowledged,

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Your Signature Date

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