

Knell Tax

Thank you for choosing Knell Tax to assist you with your taxes. This confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

Taxpayer Responsibilities

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the return carefully before signing to make sure the information is correct.

Tax Return Preparation

- We will prepare your 2023 federal and state tax income tax returns based on information you provide. Services for preparation of your return do not include auditing or verification of information provided by you.
- This engagement does not include any audit or examination of your books or records. In the event your return is audited, you will be responsible for verifying the items reported.
- The law imposes penalties when taxpayers underestimate their tax liability. Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the risks and reasonable courses of action. We will ultimately adopt, on your behalf, the alternative you select.
- Our fee is based on the time required at standard billing rates plus out-of-pocket expenses. Fees charged do not include bookkeeping or audit representation. Invoices are due and payable upon presentation. We will not electronically file your tax returns until payment is received. Payment is required for the work completed, even if the outcome is not to your liking.
- Our engagement to prepare your 2023 tax returns will conclude with the delivery of the completed returns to you (if paper filing) or your signature and our subsequent submittal of your tax return (if e-filing). We will return your original records to you at the end of this engagement. We do not have influence over the IRS or State issuing of your refunds. Please store your supporting documents and copies of your tax returns in a secure place for at least seven years. You may be assessed a fee for future copy requests.
- In the event of a complaint related to the services we provide, we agree to discuss the complaint, and if necessary, take action in a good faith effort to resolve the complaint. If we make an error on your tax return, and it is discovered after the tax return has been filed, we will pay any initial penalties & interest that result from that mistake, however, we are not responsible for additional taxes that may arise from an error.

Privacy Policy

We collect nonpublic personal information about you from various sources. Federal law prohibits us from sharing or otherwise distributing your personal information except as requested by you or as required by law. We maintain physical, electronic, and procedural safeguards that comply with federal regulations to guard your personal information. **We must have a signed consent for disclosure in your file before we will release any information.**

(Both Spouses must sign for preparation of joint returns)

Taxpayer

Date

Spouse

Date

Knell Tax

Tax Year: _____ Appointment Date: _____ Drop-off date: _____ Pick-Up Date: _____

TAXPAYER INFORMATION

Full Name _____ Social Security # _____ Birth Date _____ Occupation _____

Are you: a US Citizen a full time student legally blind disabled veteran or active duty military

Spouse's Full Name _____ Social Security # _____ Birth Date _____ Occupation _____

Are you: a US Citizen a full time student legally blind disabled veteran or active duty military

Mailing Address _____ City _____ State _____ Zip Code _____ County _____

Email Address _____ Phone _____ Other Phone _____

Spouse Email Address _____ Spouse Phone _____ Other Phone _____

FILING STATUS

- SINGLE
- MARRIED FILING JOINT
- MARRIED FILING SEPARATE
- HEAD OF HOUSEHOLD
- QUALIFYING SURVIVING SPOUSE

Y / N	If married, did you live apart from your spouse during the last 6 months of the tax year?
Y / N	Can you be claimed as a dependent on someone else's tax return?

DEPENDENTS

Full Name _____ Relationship _____ Social Security # _____ Birth Date _____ Months in home in 2023 _____ if over 18, student? _____

****We are required to send a copy of a signed 8332 with the tax return if a non-custodial parent is claiming a child.****

YES / NO Can anyone else claim your dependent(s) as a dependent on their tax return?

YES / NO Did anyone else live in the home that provided financial support for your dependent(s)?

- If yes, what is their name, and how much support did they pay? _____

YES / NO Do you receive any type of non-taxable income such as child support, welfare, social security or family support?

- If yes, what kind and how much? _____

* What proof you can provide that your dependent lives in your home? _____

ELECTRONIC FILING AND REFUND / BALANCE DUE INFORMATION

The IRS requires all returns to be filed electronically. We do not charge for this service.

* If you are getting a tax refund, would you like the refund to be direct deposited into your bank account?

YES NO Comments: _____

* If you owe tax, do you want the funds electronically withdrawn from your bank account?

YES NO Date of withdrawal (must be April 15th or sooner): _____

*** Please provide a copy of a voided check or document with current bank name, routing and account numbers**

DURING THE TAX YEAR DID YOU OR YOUR SPOUSE:

Yes

No

- 1 Have a foreign bank account? Yes No
- 2 Put any money into an IRA? (not thru an employer) Roth ____ Traditional ____ SEP ____ Yes No
- 3 Live or work in any other state? Yes No
- 4 Make contributions to a 529 Education Savings Plan? Yes No
- 5 Contribute to or use an HSA for medical expenses; must provide 1099-SA Yes No
- 6 Pay student loan interest; provide 1098-E Yes No
- 7 Did you pay for Dependent Care. Please provide detail for credit. Yes No
- 8 Make Estimated Tax Payments Yes No
- 9 Collect Social Security benefits? Yes No
- 10 Purchase and install energy-efficient property? (solar, windows, doors, etc.) Yes No
- 11 Make online sales or receive money from a 3rd party processor? (eBay, Paypal, etc) Yes No

*** If you answered yes to any of these questions, please explain below.

MISCELLANEOUS QUESTIONS

* **Virtual Currency / Digital Assets:**

At any time during 2023, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?

e.g.: Bitcoin, Ethereum, Litecoin, Dogecoin, Binance, Tether, etc.

Yes No

* Do you, your spouse, or any dependents have an Identity Protection PIN?

If you do, we must have the letter received in 2024 to electronically file.

Yes No

HEALTHCARE INFORMATION

Check the box that applies to you and your household:

- Everyone in your household had health insurance for the entire year
- No one in your household had insurance during the year
- You or someone in your household had insurance for part of the year

Please explain: _____

* Do you pay for a supplemental health insurance? If yes, please provide total paid for 2023: _____

Was your health insurance through the Marketplace?

Yes No

****If yes, please provide the form 1095-A****

NOTES / ADDITIONAL INFORMATION FOR PREPARER

Current ID(s) on file?