

# CLIENT DATA SHEET

Taxpayer Name: M / F Spouse Name: M / F  
Occupation: Occupation:  
SSN/TIN: SSN/TIN:  
Birthdate: Birthdate:  
Address:  
City: State: ZIP:  
Taxpayer Phone: Spouse Phone:  
Taxpayer Email: Spouse Email:

## Dependents (List youngest first)

| Name | DOB | SSN | Relationship |
|------|-----|-----|--------------|
|------|-----|-----|--------------|

## Check All That Apply

- |   |                              |
|---|------------------------------|
| You and/or your dependents had Marketplace Health Insurance | Wage Statements (W-2s)       |
| Someone else can claim you as a dependent                   | Tips / Other Income          |
| You paid Federal/State taxes last year (Self-employed only) | 1099s                        |
| You or spouse lived or worked in another state              | Unemployment Income          |
| You paid student loan interest                              | Social Security Income       |
|   | Pension or Retirement Income |
|   | IRA Income                   |
|   | Alimony (Paid or Received)   |
|   | Medical Expenses             |
|   | Mortgage Interest            |
|   | Mortgage Points              |
|   | Property Taxes               |
|   | Charity Contributions        |
|   | Education Expenses           |
|   | Student Loan Payments        |
|   | Childcare Expenses           |

## Choose Your Refund Option

- Bank Product (fee taken from refund – additional service fee applies)
- Pay preparation fee upfront

## Direct Deposit

Checking Savings

Routing#: Account#:

# ENGAGEMENT AGREEMENT FOR TAX PREPARATION SERVICES

## ***About This Engagement***

We are pleased to assist you with preparing your federal income tax return, and state or local returns if applicable, for the tax year listed in this agreement. Your returns will be prepared based on the information you provide to us. We do not audit or verify the information you submit; however, we may ask questions if something appears incomplete or unusual. Any services outside of preparing your tax return — such as bookkeeping, tax planning, or IRS representation — are not included in this engagement unless we agree to them separately in writing.

## ***Your Responsibility for Information Provided***

You are responsible for providing complete and accurate information needed to prepare your tax return. We will rely on the information you provide and will not audit or verify your documents. Please be sure that all income, deductions, dependents, and credits are properly supported by records or receipts in case they are requested by the IRS or a state agency.

## ***Document Retention***

We will provide you with a copy of your completed tax return for your records. You are responsible for keeping copies of your tax return and all supporting documents (such as W-2s, 1099s, receipts, and other records) for at least seven (7) years, or as otherwise required by law. We do not keep permanent copies of client records, and any documents you provide to us may be securely destroyed after your return is completed.

## ***Examination or IRS Notices***

If your tax return is selected for review or audit by the IRS or a state agency, we will be happy to discuss how we may assist you. However, responding to IRS or state notices, audits, or examinations is not included in this engagement and will require a separate agreement and additional fees.

## ***Fee Payment***

Payment for tax preparation services is due before your tax return is filed or released to you. Your return will not be filed until payment is made in full and you have reviewed and approved the completed return. Any penalties, interest, or delays caused by late payment or late submission of information are the responsibility of the client.

## ***IRS Audit & Documentation Disclosure (Client Initials Required)***

I understand that the IRS and state agencies may request proof of the income, deductions, credits, dependents, or other items reported on my return.

I understand that I am responsible for maintaining receipts, records, and documentation to support all items reported on my tax return.

I understand that unsupported deductions or claims may result in additional tax, penalties, or interest assessed by the IRS or state agencies.

I understand that the tax preparer is not responsible for any adjustments made by the IRS or state agencies due to lack of documentation or inaccurate information provided by me.

By initialing above, I acknowledge that I understand these disclosures and accept responsibility for maintaining documentation to support the information reported on my return.

## ***Client Acknowledgment & Authorization***

I confirm that I have read and understand this Engagement Agreement and that the information I provide for preparation of my tax return will be true, correct, and complete to the best of my knowledge. I authorize the tax preparer to prepare my tax return based on the information I provide.

Taxpayer Name:

Date:

Signature:

Spouse Name (if filing jointly):

Date:

Signature:

Tax Preparer:

Date:

***PAYING UPFRONT IS THE BEST OPTION TO  
AVOID THE SERVICE FEE OF  
\$179.90 THE BANK CHARGES TO PAY US  
FOR YOU.***

- Zelle 832-792-4242 Dwayne Knotts Jr
- Applepay 713-363-1000
- Cashapp \$SuziCTS (add \$11 convenience fee for cashapp)
- Venmo Suzanne Alvarado (@Suzanne-Alvarado) send as payment between friends NOT for a service
- Paypal carringtaxservice@gmail.com Send as a gift NOT service