



Drop Off or Appointment Date: \_\_\_\_\_

Are you a returning Client?    YES    NO    Preferred Tax Preparer:    Ann    Angela    Misty

Name: \_\_\_\_\_ Best Number to call: \_\_\_\_\_

Taxpayer Phone #: \_\_\_\_\_ Spouse Phone #: \_\_\_\_\_

Preferred method of contact for questions on return:    **CALL**    **TEXT**    **EMAIL**

Email Address: Taxpayer \_\_\_\_\_ Spouse: \_\_\_\_\_

Would you like a Secure PDF Copy of your return by Email?    **YES**    **NO**

I have included the following with this Drop Off:

YES    NO

\_\_\_\_ Signed Engagement Letter (2<sup>nd</sup> Page)    MANDATORY

\_\_\_\_ Copy of Taxpayer & Spouse (if applicable) Driver's License    MANDATORY  
*(Email picture or scanned copy to Admin@alwoodaccounting.com)*

\_\_\_\_ Do you have health insurance with the Marketplace (healthcare.gov)

\_\_\_\_ I want any refund to be directly deposited

Bank Name: \_\_\_\_\_ Acct #: \_\_\_\_\_

\_\_\_\_ Has your address changed within the tax year? If Yes, please list current address

\_\_\_\_ Any new dependents for the tax year? Copy of Social Security Card Required

\_\_\_\_ Can you be claimed as a dependent by someone else?

\_\_\_\_ Are you or your spouse and active/retired/veteran of any branch of military?

Any Other Information you want Tax Preparer to know: \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

NOTE: If you FAIL to give tax preparer any documents for preparing your taxes, any response to any IRS letters, notices or additional documents brought in after the return is prepared will result in an additional charge for an amended return or required response. I have read this statement and understand.    Initials \_\_\_\_\_

Office Use Only
_____
_____



January 2024

Engagement Letter for Individual Income Tax Services,

To minimize the possibility of a misunderstanding between us, we are setting forth pertinent information about the services we will perform for you.

We will prepare your 2023 Federal and requested state income tax returns from information which you will furnish to us. We will not audit or otherwise verify the date you submit, although we may ask you to clarify some of it or furnish us with additional data.

If you request, we will also prepare your estimated tax voucher for 2024. Please advise us if you anticipate substantially lower income for 2024, a change in withholding taxes, or a significant increase in your 2024 income. Should this occur later in the year, please advise us at that time.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. We will provide you with questionnaires and an organizer to guide you in gathering the information. You represent that the information that you are supplying to us is accurate and complete, to the best of your knowledge, and that your expenses for meals, entertainment, travel, gifts, charitable contributions and vehicle use are supported by records as required by law. You should retain all the documents, canceled checks and other data that form the basis 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 and file them.

We appreciate the opportunity to be of service to you and believe this letter accurately summarizes the significant terms of our engagement. If you have any questions, please let us know. If you agree with the terms of our engagement as described in this letter, please sign in the space indicated below and return it to us. This letter will continue in effect until canceled by either party.

Sincerely,

A.L. Wood & Associates Accounting

ACKNOWLEDGEMENT;

This letter correctly sets forth our understanding. T

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_



# What do you need to bring to do your taxes?

1. Form W2 from all employers last year
2. SSA-1099 for social security benefits
3. 1099 R for withdrawals from a retirement account
4. 1099-Misc for payment from people who weren't your employer (i.e. self-employed)
5. 1099-K for credit card payments received (selling on eBay, driving for Uber, etc.)
6. Form 1099-Int for interest received from banks or stocks
7. Form 1099-DIV for any brokerage accounts (i.e. Edwards Jones, TD Ameritrade)
8. Mortgage Interest Statements and Property Taxes paid in last year for Itemized Schedule
9. Taxpayers & Dependents Social Security Cards
10. Rental property Income & Expenses
11. Expenses for any self-employed activities for last year
12. 1098T for college expenses and out of pocket cost for books and required class items, this includes a computer and software costs.
13. Student Loan Interest
14. HUD statement if you bought or sold a property last year
15. Gambling winnings from the lottery or a casino where you had to give your social security number upon claiming the winnings
16. Cancellation of Debt-1099-C, these will be issued if a credit card company or loan company "forgive" any debt you had and no longer hold you liable for the debt.
17. Anything that has come in your mail that states this is an IMPORTANT TAX DOCUMENTS, bringing more is far better than not having what we need.