DROP OFF SHEET

YOUR TAX RETURN CAN BE DONE MORE ACCURATELY AND IN A SHORTER PERIOD OF TIME BY PROVIDING THE FOLLOWING INFORMATION.

☐ New Client? *Please provide last year's tax returns*

☐ Returning Client? *Completing the following could lead to a larger refund or a lower tax liability!*

PERSONAL INFORMATION

Taxpayer Name: ______________________________ SSN: ____________________

DOB: __________________________ Occupation: ___________________________

☐ Blind ☐ Disabled ☐ Dependent of Someone Else ☐ Active Duty Military

Spouse Name: _______________________________ SSN: ____________________

DOB: __________________________ Occupation: ___________________________

☐ Blind ☐ Disabled ☐ Dependent of Someone Else ☐ Active Duty Military

CONTACT INFORMATION

Address _________________________________ City, State Zip __________________

Phone #: Home: _________________________ Mobile: ___________________________

Email Address: ____

FILING INFORMATION

Filing Status: ☐ Single ☐ Married Filing Jointly ☐ Married Filing Separately ☐ Head of Household ☐ Qualifying Widow(er)

Direct Deposit: ☐ Yes (attach voided check) ☐ No

DEPENDENTS

Name: ________________________________ SSN: ___________________________

Relationship: ___________________________ DOB: ___________________________

Name: ________________________________ SSN: ___________________________

Relationship: ___________________________ DOB: ___________________________

Name: ________________________________ SSN: ___________________________

Relationship: ___________________________ DOB: ___________________________

*Please list additional dependents on separate sheet

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"THE RIGHT QUESTIONS"

YES	NO	
☐	☐	Were any of your unmarried children who might be claimed as dependents 19 years of age or older at the end of the tax year?
☐	☐	Did you have any children under age 19 or full-time students under age 24 at the end of the tax year with interest and dividend income in excess of $950, or total investment income in excess of $1,900?
☐	☐	Did you receive unreported tip income of $20 or more in any month?
☐	☐	Did you cash any Series EE U.S. savings bonds issued after 1989 and pay qualified higher education expenses for yourself, your spouse, or your dependents?
☐	☐	Did you have any foreign income or pay foreign tax?
☐	☐	Did you start a business or farm, purchase rental property, or receive a K-1?
☐	☐	Did you purchase or dispose of any business assets (furniture, equipment, vehicles, real estate, etc.) or convert any personal assets to business?
☐	☐	Did you buy or sell any stocks, bonds or other investment property?
☐	☐	Did you purchase, sell or refinance your principle home or second home, or did you take a home equity loan?
☐	☐	Did you have any debts cancelled or forgiven?
☐	☐	Did you receive a distribution from a retirement plan (401K, IRA, Pension, etc.)?
☐	☐	Did you make a contribution to a retirement plan?
☐	☐	Did you transfer or rollover any amount from one retirement plan to another retirement plan, or convert any amount from a traditional IRA to a Roth IRA?
☐	☐	Did you, your spouse or a dependent incur any tuition expenses that are required to attend a college, university or vocational school?
☐	☐	Did you work out of town for part of the year?
☐	☐	Did you make any estimated tax payments for this tax year?
☐	☐	Was your home rented out or used for business?
☐	☐	Do you have an HSA or MSA?
☐	☐	Have you been affected by a Federal Disaster?
☐	☐	Were you notified or audited by either the IRS or the State taxing agency?
☐	☐	Did you purchase any energy efficient property (ex. Windows, Furnace & A/C, etc.)?

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TAX PREPARATION PERMISSION & ENGAGEMENT LETTER

Thank you for selecting The Old Tax House to assist with your tax return preparation services. This letter will confirm the arrangements of services we will provide.

TAX PREPARATION SERVICES: We will prepare your 2011 federal and all state income tax returns you request using information you provide to us. It is your responsibility to provide information required for preparation of complete and accurate returns. We may ask for clarification of some items, but we will not audit or otherwise verify the data you submit. We will furnish you with questionnaires and/or worksheets as needed to guide you in gathering the necessary information, which will help you avoid overlooking important information and contribute to efficient preparation of your returns. Your use of such forms will help keep the cost of our services as low as possible. Ultimately, you are responsible for the returns, so you should review them carefully before you sign them.

Client Pickup Date _________________

Our work will not include any procedures to discover defalcations or other irregularities. The only accounting or analysis work we will do is that which is necessary for preparation of your income tax returns. Without disclosure in the return itself of the specific position taken on a given issue, we must have reasonable belief that it is more likely than not that the position will be held to be the correct position upon examination by taxing authorities. In the event we and/or you are assessed penalties due to our reliance on inaccurate, incomplete, or misleading information you supplied to us (with or without your intent or knowledge), you will indemnify us, defend us and hold us harmless as to those penalties.

All of your original documents will be returned to you at the end of this engagement. We will retain copies of records you supplied to us along with our work papers for your engagement for a period of three years. You should keep all documents, cancelled checks and other data that support your reported income and deductions. They may be necessary to prove accuracy and completeness of the returns to a taxing authority. You should keep all original records in a secure location for a minimum of ten years.

The timeliness of your cooperation is essential in our ability to complete this engagement. Specifically, we must receive information from you in a reasonable period of time prior to the applicable filing deadline. Accordingly, if we do not receive information from you in a timely manner it may be necessary to pursue an extension of the due date of your returns, and we reserve the right to suspend our services or withdraw from this engagement.

If you file a joint return, because you will each sign the returns, you are each our client. You each acknowledge that there is no expectation of privacy from the other concerning our services and we are at liberty to share with either of you, without the prior consent of the other, any and all documents and other information concerning preparation of your returns. You also acknowledge that unless we are notified otherwise in advance and in writing, we may construe an instruction from either of you to be an instruction on your joint behalf.

TAX PREPARATION FEES: Our fees are based on a price per form/schedule required to complete your return. Additional charges may include: multi-state returns filed, bookkeeping necessary for the preparation of your tax return, tax consultation for estimates, amended tax returns, FAFSA reports, etc. which are identified separately on your invoice.

OTHER SERVICES: Bookkeeping, payroll, payroll reports, year-end reports such as W2's and 1099's, business consultation, interim and year-end tax planning. These services are billed separately; you may contact us for our fee schedule.

Although we may verbally discuss tax planning issues with you from time to time, such discussions will not constitute advice upon which we intend for you to rely for any purpose. Rather, any advice upon which we intend for you to rely, and upon which you will rely, will be embodied in a written report or correspondence from us to you, and any such writing will supersede any prior verbal representations between the parties on the issue.

Occasionally mistakes are made so please forgive us as we are human.☺ Be courteous and let us know if you receive any letters from the government. We do correct returns for free and pay any penalties, if we are at fault. However, we are not responsible to pay any taxes owed.

PLEASE REVIEW YOUR RETURNS CAREFULLY BEFORE SIGNING AND FILING THEM. If you have any questions please call. Thank you for allowing us to serve you this year. We greatly appreciate your business!

The Old Tax House is not responsible for providing any of the deductions taken on my tax return(s). I have provided this information from my own records and I have proof of my deductions and income. I give my permission to The Old Tax House to prepare my tax return(s) and I have read, understand and agree to the terms of this engagement. I have also read the E-file Information below and have been offered a copy of our Privacy Policy Act.

______________________________________ ____________________
Taxpayer Date

______________________________________ ____________________
Spouse Date

E-FILING – SIMPLE & SAFE

It is mandatory that you sign IRS Form 8879 after we have completed the return. The return will not be electronically filed until The Old Tax House has possession of the signed form. **BOTH PARTIES MUST SIGN, IF MARRIED FILING JOINTLY.**

Your refund may be delayed for reasons such as, but not limited to: Random IRS audit, Earned Income Credit eligibility verification, Incorrect Bank Account/Routing number

Your refund may be seized or reduced for reasons such as, but not limited to: Unpaid child support, Back taxes owed, Payments in arrears to any Federal or State Agency such as Student Loan Deficiency.

A return may be rejected by the IRS for reasons such as, but not limited to: Social Security Number issues (ie. Name and Number do not match SSA records), Dependent claimed on another tax return, Invalid/Wrong birth date.

IRS EXPECTED REFUND CYCLES ARE NOT GUARANTEED. Any date given to you is based on IRS Expected Refund Distribution Dates. Check www.irs.gov **"Where's My Refund"** for specific information.

STATE DEPARTMENTS DO NOT PROVIDE EXPECTED REFUND DATES. Check State Department of Revenue websites for more information.
Missouri's Return Inquiry System: https://dors.mo.gov/tax/taxing/welcome.jsp

If Electronic Filing of your tax return cannot be complete, or your refund is seized or delayed we will not adjust or refund any part of your fee.

Please Initial Here __________