



Tax Year: _____

Personal Tax Client Paperwork

Name (and Spouse) _____

Address _____

Phone (& Spouse) **Please add 423-854-9908 and our text only line 423-588-1845 to your contacts so you have our information and check your voicemail to see if it is full.**

Email (& Spouse's email if choosing electronic signature) _____

Which format would you like your final return?

- Electronic Paper Both

Social Security Number

Taxpayer: _____ Spouse: _____

Date of Birth: _____

Taxpayer: _____ Spouse: _____

Quick Tax Survey

Do you have any children? <input type="checkbox"/> Yes <input type="checkbox"/> No	Did you open a new business? <input type="checkbox"/> Yes <input type="checkbox"/> No	Did you open a new rental? <input type="checkbox"/> Yes <input type="checkbox"/> No
Did you have Marketplace health insurance? (Obama-care) <input type="checkbox"/> Yes <input type="checkbox"/> No	Did you close a business? <input type="checkbox"/> Yes <input type="checkbox"/> No	Did you close a rental? <input type="checkbox"/> Yes <input type="checkbox"/> No
Did you purchase any property? <input type="checkbox"/> Yes <input type="checkbox"/> No	Did you sell any property? <input type="checkbox"/> Yes <input type="checkbox"/> No	Did you receive any inheritance? <input type="checkbox"/> Yes <input type="checkbox"/> No
Did you have any foreign income or withholding? <input type="checkbox"/> Yes <input type="checkbox"/> No	Did you have a new child this year? <input type="checkbox"/> Yes <input type="checkbox"/> No	Are you a non-custodial parent claiming a child? <input type="checkbox"/> Yes <input type="checkbox"/> No
Are you in college? <input type="checkbox"/> Yes <input type="checkbox"/> No	Are you paying for your child's college education? <input type="checkbox"/> Yes <input type="checkbox"/> No	Did you pay any alimony this year? <input type="checkbox"/> Yes Date of Divorce _____ <input type="checkbox"/> No
Did you receive any alimony this year? <input type="checkbox"/> Yes Date of Divorce _____ <input type="checkbox"/> No	Any involvement with cryptocurrency? <input type="checkbox"/> Yes <input type="checkbox"/> No	Did you receive any interest this year? <input type="checkbox"/> Yes <input type="checkbox"/> No
Did you receive any retirement distributions? <input type="checkbox"/> Yes <input type="checkbox"/> No	Did you rollover or withdraw from a retirement account? <input type="checkbox"/> Yes <input type="checkbox"/> No	Do you have any stock accounts other than retirement accounts? <input type="checkbox"/> Yes <input type="checkbox"/> No
Do you have any out-of-state income? <input type="checkbox"/> Yes <input type="checkbox"/> No	Did you have any charitable contributions? <input type="checkbox"/> Yes <input type="checkbox"/> No	



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Legal Disclaimers

- I understand that my information will be stored electronically for the audit period of my return on the server at Account4 Business Services, which is maintained in compliance with IRS security standards and backed up regularly with our IT provider.
- We will prepare your return for the tax year listed on the front page and any required state income tax returns.
- Any additional years of tax returns prepared will be at an additional charge.
- Having your information well organized will keep your fees to a minimum. If bookkeeping is required, we will call you first for your consent on a quote. Your quote will be based on an assessment of the information you provided and our standard bookkeeping billing rate of \$70/hour.
- Your retention of documents is key! Please store your returns and the documents that go with them in a safe place for your records. As a rule of thumb, most businesses and individuals should store their returns for 10 years and their W2s until they begin collecting Social Security.
- We will use our professional judgment in gray areas of the tax law. We represent you—we will resolve issues in your favor whenever possible.
- Please remember that you have ultimate responsibility for your return. Review your return carefully at time of pickup. Even if you sign your 8879, we wait at least one day before filing your return, so you have time to review it.
- Invoices are due at time of pickup unless you are a current subscription client. Subscription clients will be billed with their next billing cycle.
- Signing below indicates you agree to have us file your return.

Client

Date

Thank you so much for choosing Account4 Business Services!