



Client Information Form

Tax Year 2022

Taxpayer Information

Full Name Social Security #

Date of Birth Drivers License # & State Occupation

Phone # Email

Address City, State Zip

Spouse's Information

Full Name Social Security #

Date of Birth Drivers License # & State Occupation

Phone # Email

Filing Status

-Marital Status at the end of 2022 Married Single

*If married, did you live apart from your spouse during the last 6 months of 2022? Yes No

-Did you pay for over half the cost of keeping up your home during 2022? Yes No

*Upkeep expenses include rent, utilities, food eaten in the home, mortgage interest, real estate taxes, and insurance on the home. If you use payments you received under any public assistance program to pay for part of the cost of keeping up your home, you cannot count them as money you paid. However, you must include them in the total cost of keeping up your home to figure if you paid over half the cost.

By answering "yes," you are confirming that if requested by the IRS, you can provide documentation that verifies you paid for over half the cost of keeping up your home, such as rent receipts, utility bills, grocery receipts, and other household bills.

-Can you be claimed as a dependent on someone else's tax return? Yes No

Dependents (not spouse)

First Name	Last Name	DOB	SS#	Relationship	#of months in home

ONLY answer the following questions if you have dependents other than spouse

-If requested by the IRS, what documentation can you provide that shows evidence of the relationship between you and each of your dependents listed above (birth certificates, court documents, letters from authorized placement agencies, etc...)?

-If requested by the IRS, what documentation can you provide that shows evidence that each of your dependents lived with you for the number of months stated above during 2020 (school, medical, childcare provider, social service records, etc...)?

-Are you claiming a child who was between 19 and 23 years of age at the end of 2020 and a full-time student for any part of 5 calendar months during 2020? If yes, please list the educational institution and the months of attendance by the child as a full-time student.

-Are you claiming a child who is permanently and totally disabled? If requested by the IRS, can you provide documentation that verifies the child is permanently and totally disabled, such as a note from a doctor, healthcare provider, or social service program?

-Are you claiming a child who is not your own son or daughter? If yes, please explain why the parents of the child are not claiming the child.



TERMS OF ENGAGEMENT

Thank you for choosing Angelo Tax Service to assist you with your 2020 taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your federal and state income tax returns based on the information you furnish to us. We will not audit or otherwise verify the data you submit to us, although we may ask you to clarify some of it.

In order to timely file your tax returns we need all required information no later than **March 25, 2023**. You may be required to request an extension if we do not receive all required information by the above date.

We will use our judgment in resolving questions where the tax law is unclear or where there may be conflicts between the taxing authority's interpretation of the law and other supportable positions. Unless otherwise instructed by you, we will resolve such questions in your favor whenever possible.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You represent that there is adequate substantiation to support deductions for any expenses claimed on the return. **You are ultimately responsible for the accuracy of your return and should review it carefully before signing it.**

Your returns may be selected for review by the taxing authorities. In the event of such government tax examination, or correspondence, we will be available to represent you to the extent legally allowed.

If there is an error on the return resulting from incorrect information supplied by you, or due to your subsequent receipt of amended or corrected tax forms (w-2's, 1099's, K-1's), you are responsible for the payment of any additional taxes which would have been properly due on the original return, along with any interest and penalties charged by the IRS. Our starting fee for this work (1040X) is \$75.

In the event of preparer error, you are responsible for any additional tax that may be due. Angelo Tax Service's liability is limited to amending the return, and interest & penalties up to the date of discovery.

Our engagement to prepare your 2023 tax returns will conclude with the delivery of the completed returns to you, or your signature and our subsequent submittal of your tax return. Review all tax return documents carefully before signing them.

Your invoice will be due and payable upon completion of your return. Additional services will not be performed until the invoice for these services is paid in full.

It is our policy to keep records related to this engagement for 5 years. However, we do not keep any of your original records, you should retain those records in secure storage. Upon the expiration of the 5-year period, we will destroy our records related to this engagement.

Thank you for the opportunity to be of service. If you have any questions, contact the office at 325-703-2112.

Your signature below indicates that all the information given is true and correct to the best of your knowledge and that you agree to & accept these Terms of Engagement.

Your Signature & Date

Spouse Signature & Date