

PRIMARY TAXPAYER	
Name:	Social Security #:
Phone Number:	Date of Birth:
Email:	Occupation:
Current Address:	Did you move in 2023? (circle one) YES / NO
City, State, Zip:	Date of Move:
Filing Status (circle one): Single / Married jointly / Married and separately / Head of household	Previous Address:
At any time during 2023, did the taxpayer receive (as a reward, award, or payment, mining, or hard fork) or sell, exchange, barter or gift, or otherwise dispose of a digital asset (or any financial interest in a digital asset)? (circle one) YES / NO	City, State, Zip:
	Drivers License # , Issue date Expiration Date
Marital Status:	

SPOUSE	
Name:	Address (if different):
Date of Birth:	City, State, Zip:
Social Security #:	Phone Number:
Drivers License #	Issue Date, Expiration Date,

DEPENDENT INFORMATION (Being Claimed)					
Dependent Name	Relationship	DOB	Social Security #	Full Time Student?	Disabled?
		/ /		<input type="checkbox"/>	<input type="checkbox"/>
		/ /		<input type="checkbox"/>	<input type="checkbox"/>
		/ /		<input type="checkbox"/>	<input type="checkbox"/>

INCOME & EXPENSES INFORMATION (If you check 'YES', please provide supporting documentation)			
Income From:	Check if YES	Income From:	Check if YES
Wages (<i>must provide W-2 document</i>)	<input type="checkbox"/>	Self-Employment (1099-NEC or 1099-MISC.)	<input type="checkbox"/>
Interest Income (1099-INT)	<input type="checkbox"/>	Social Security/Retirement (SSA-1099)	<input type="checkbox"/>
Dividend Income (1099-DIV)	<input type="checkbox"/>	Rental Property	<input type="checkbox"/>
Sale of Stock (<i>must provide 1099-B document</i>)	<input type="checkbox"/>	Unemployment Benefits (1099-G)	<input type="checkbox"/>
Expenses From:	Check if YES	Expenses From:	Check if YES
Self Employment	<input type="checkbox"/>	Medical / Dental Care	<input type="checkbox"/>
Education (1098-T)	<input type="checkbox"/>	Rental Property	<input type="checkbox"/>
Credits and Deductions:	Check if YES	Credits and Deductions:	Check if YES
Donate cash or goods to charity?	<input type="checkbox"/>	Pay student loan interest?	<input type="checkbox"/>
Pay child / dependent care expenses?	<input type="checkbox"/>	Have a mortgage payment? (1098)	<input type="checkbox"/>
Make an IRA contribution?	<input type="checkbox"/>	Make a major taxable purchase?	<input type="checkbox"/>
Pay property taxes?	<input type="checkbox"/>	Gambling Income? W2-G	<input type="checkbox"/>
Miscellaneous:	Check if YES	Miscellaneous:	Check if YES
Sell a house? (1099-S)	<input type="checkbox"/>	Take an IRA or 401(k) distribution?	<input type="checkbox"/>
Pay / receive alimony? If yes, date of divorce?	<input type="checkbox"/>	Adopt a child?	<input type="checkbox"/>
Have foreign bank account / trust?	<input type="checkbox"/>	Energy Credits?	<input type="checkbox"/>

Streetsboro Tax Service is pleased to provide you with personal income tax preparation for your 2023 returns. This letter sets out the terms and conditions of this engagement.

- We will prepare your 2023 Federal, Ohio (or other resident state) and resident city, school district income tax returns from information you furnish to us. We are responsible for preparing only the returns listed specifically in this letter.
- You have taxable activity in a state other than that specifically listed, you are responsible for providing our firm with all information necessary to prepare any additional state(s) or local income tax returns as well as informing us of the applicable states.
- It is your responsibility to maintain, in your records, the documentation necessary to support the data you provided to us for preparing your returns. We are authorized by you to rely on your data without further audit or verification.
- If you are self-employed, or otherwise operate a business, you are responsible for records including your time in those activities as well as your basis in such activities.
- You are responsible for Ohio sales and use, and Ohio CAT tax returns.
- We maintain no responsibility for the analysis of whether payments you make for services are independent contractor payments or employee payments, or prepare 1099s for contractors unless you separately engage our firm in this regard. You affirm that you have timely sent all required 1099s to third parties.
- You have reported to us the existence of all foreign bank accounts, assets, trust, or corporate interests held outside the US.
- The law provides various penalties and interest that may be imposed if taxpayers underestimate or underreport their tax liability. You acknowledge that any such understated tax and any imposed interest are your responsibility and we have no responsibility in that regard.
- Indemnification: by engaging our firm, you agree to indemnify Streetsboro Tax Service for expenses incurred by our firm, including our normal hourly rate of fees, if our firm is called into a legal dispute between you and a third party.
- Alternative resolution: by engaging our firm, you agree to arbitrate any dispute you have with Streetsboro Tax Service created by preparation of this income tax return.
- Limitation on damages: By engaging our firm in the preparation of your income tax returns, you agree that our errors and omissions liability will not exceed our fees collected for this engagement plus IRS penalties and interest.
- Our engagement will be complete upon the delivery of the completed returns to you. Thereafter, you will be solely responsible to pay any balances due.
- It is our policy to retain engagement documentation and copies of returns for a period of seven years, after which time we will commence the process of destroying documents.
- Our fees for this engagement will be calculated based on our normal 1040 billing procedures.
- Direct deposit certification: IRS now requires tax practitioners to verify the accuracy of bank account numbers and routing numbers for accounts receiving tax refunds. Please insert the correct numbers below, and signing this engagement letter serves as verification of banking information. If the below information is not complete, your refund will be processed as a mailed check from IRS/State.
- If you are dropping off your tax return at our office for preparation, you understand that we will electronically file your tax return, unless otherwise not allowed by the IRS.
- You have informed us of any cryptocurrency you've received, sold, sent, or acquired during the tax year.

Please indicate your acceptance of these terms by signing below; this letter correctly sets out terms of tax preparation engagement. Please indicate your understanding of this policy by initialing here: _____

Print name: _____

Sign name: _____

Date: _____

@ Cash and check payments are appreciated. An additional 3% convenience fee will be added to card payments.

Direct Deposit Verification

Last four digits of account if using same as year prior

Bank Name: _____

Routing #: _____

Account #: _____

Circle one: SAVINGS or CHECKING