

CUDDY TAX PACKET

MANDATORY COMPLETION

The Cuddy Tax Packet, included with this mailing, **MUST BE** completed and returned to us with your source documents.

NO return preparation will be initiated without these forms:

2020 Client Engagement Letter	
2020 Checklist/Tax Organizer	2020 Yellow Questionnaire
2020 Consent for Use	2020 Consent for Disclosure
Banking Information	Income Tax Return Checklist

A printable PDF version of these forms is available at:
<http://www.cuddyfinancial.com/p/menu-of-services>

CUDDY FINANCIAL SERVICES - 2020 TAX RETURN QUESTIONNAIRE

IMPORTANT – THIS FORM MUST BE COMPLETED IN ORDER TO BEGIN YOUR TAX RETURN!

Instructions: Please respond to all questions on this form. These questions are required for us to determine all deductions and credits you may be eligible for when completing your 2020 Tax Return. Additionally, please review and update prior year information included on your enclosed Client Organizer Checklist. There is a designated space on page 2 of this form to indicate any major changes that took place in 2020 that could affect your Tax Return, such as buying or selling a home, retirement, Social Security, opening a business, etc. Please provide related paperwork with your tax documents. A fillable PDF version of this form is available at <http://www.cuddyfinancial.com/p/menu-of-services>.

GENERAL INFORMATION

Client Legal Name(s) _____

Preferred name to use: _____

If we have any questions regarding your tax return preparation, please reach me as follows:

Phone _____ Email _____

• Has there been a change in marital and/or filing status affecting your 2020 tax return? YES (list below) NO

• Should any new dependents be added to or removed from your 2020 tax return? YES (list below) NO

Add: Name _____ SSN _____ Birth date _____

Remove: Name(s) _____

DELIVERY OF INFORMATION TO/FROM CLIENT

To enhance services and improve operational efficiencies this tax season, we have adopted encrypted email technology for the e-delivery of tax returns and documents to and from our Clients. This year **ALL** client copies of their tax returns will be delivered through **encrypted email**. It requires no setup on your part and is easily activated through an embedded email link originating from our staff. If you have not used this encrypted email service before, you must call our office or send an email to taxprep@cuddyfinancial.com requesting an encrypted email. Shortly after you will receive an email response from our Admin staff that includes an embedded encryption link. Paper delivery remains an alternative to e-delivery. Please indicate your preferred method of receipt/delivery of items listed below.

- **Delivery of Tax Returns will be sent by encrypted email unless the box below is checked.**
- **If you do not have an email address or must have a paper copy of your return, please check here.**

ECONOMIC IMPACT PAYMENT (STIMULUS PAYMENT)

Did you receive a stimulus payment by either check, direct deposit, or debit card from the IRS for yourself or your family? If you did receive a stimulus payment in 2020 and/or the stimulus check in January 2021, what was the total amount that you received for your household? 1st Stimulus \$ _____, 2nd Stimulus \$ _____. **Please provide the stimulus check stub or Notice 1444, or a copy of the direct deposit from your bank statement or any other documentation verifying payment.** If you are not sure if you received either payment, please go to the IRS website, www.irs.gov, and click on the Get My Economic Impact Payment. Once the page opens click on get my payment then okay, on the next page that opens enter the required information just as it appears on your tax return and click continue. This will open the next page which will show the dates and how you received your stimulus check, it will not however show the amount.

CLIENT SIGNATURES

Client signatures are required on a variety of documents including tax returns, E-file authorizations, disclosures, etc. This tax season, we will utilize **DocuSign** to provide our clients with an easy, secure way of signing documents electronically. **DocuSign** requires no setup on the Client's part and may be accessed on virtually any device through **encrypted** email originating from our staff. Signature on paper remains an alternative to e-signing. Please indicate your preferred method for signing documents below.

I will e-sign with DocuSign

I will sign on paper

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TAXES

- Did you make any estimated tax payments for the 2020 tax year?
 YES (provide dates and amounts on Client Organizer) NO
- If not previously done, please provide any correspondence, to or from the IRS or State taxing authority, including any adjustments made to prior returns that could affect later returns, with your tax documents at the time of drop-off. You may attach copies.

NON-ITEMIZED DONATIONS

If you did not itemize on Schedule A, you may qualify to take an additional deduction for Charitable Contributions of up to \$300. Did you make any **cash** contributions greater than \$300? Yes No If no, how much was your contribution? \$ _____

DRIVERS LICENSE – COMPLETE ONLY IF NEW CLIENT OR IF RENEWED W/IN THE LAST 18 MONTHS

Submit a copy of BOTH the FRONT & BACK of your Driver’s License for you and your spouse.

HEALTH CARE

- Were you, your spouse, and or dependent(s) covered by Health Insurance for the entire year of 2020? YES NO
- Did you purchase your Health Insurance through the Marketplace? YES NO
 - **IF YES, YOU MUST SUBMIT A FORM 1095-A WITH YOUR TAX DOCUMENTS.**

OUT OF STATE /INTERNET PURCHASES

Did you make any out-of-state or internet purchases in 2020 that the seller **DID NOT** collect NYS sales or you did not pay any use tax on? YES NO If YES: Use NYS Estimated Table Amounts. Actual amount of purchases \$ _____

BUSINESS OWNERS AND LANDLORDS

IMPORTANT! You must submit invoices with descriptions for all expenditures made for repairs & maintenance, improvements, appliances, and other related improvements.

ADDITIONAL INFORMATION

Please check the appropriate box and include all necessary details and documentation.

Please note: If the section is not applicable, please check the N/A Box and move to the next section.

Yes No

Please check the appropriate box and include all necessary details and documentation.

Please note: If the section is not applicable, please check the N/A Box and move to the next section.

Yes No

Personal Information:

If all items in this section do not apply, check the N/A Box, and skip to the next section: N/A

- Did your address change from last year?
- Can you be claimed as a dependent by another taxpayer?

Dependent Information:

If all items in this section do not apply, check the N/A Box, and skip to the next section: N/A

- Do you have any children over age 18 and is not a full-time student? Please provide information.
- Do you have dependents who must file a tax return?
- Did you provide over half the support for any person(s) other than your dependent children during the year?
 If yes, please provide documentation
- Did you pay for childcare while you worked or looked for work?
- If yes, provide a statement from the daycare provider listing:
 The provider’s name, SSN or Fed ID, and address, plus the names of your children who were cared for and the amounts paid for each child.

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ADDITIONAL INFORMATION CONTINUED

Purchases, Sales, and Debt Information:

Yes No

If all items in this section do not apply, check the N/A Box, and skip to the next section: N/A

- | | | |
|--|--------------------------|--------------------------|
| Did you start a new or sell an existing business during the year?
If yes, please provide documentation. | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you acquire a new or additional interest in a partnership or S corporation?
If yes, please provide documentation. | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you sell, exchange, or purchase any real estate during the year?
If yes, please provide a closing statement(s) or HUD1 statement. | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you take out a home equity loan this year? If yes, please provide the closing statement and the Form 1098 for mortgage interest paid. | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you lend money with the understanding of repayment and this year it became totally uncollectable?
If yes, please provide documentation. | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you have any debts canceled or forgiven this year, such as a home mortgage, credit cards, or student loans?
If yes, please provide Form 1099-C. | <input type="checkbox"/> | <input type="checkbox"/> |

Health Care Information:

If all items in this section do not apply, check the N/A Box, and skip to the next section: N/A

- | | | |
|---|--------------------------|--------------------------|
| Did you make any contribution to a Health Savings Account (HSA) or Archer MSA?
If yes, please provide Form(s) 5498-SA. | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA this year? If yes, provide Form(s) 1099-SA. | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you pay long-term care insurance premiums for yourself or your family?
If yes, please provide documentation on how much and for whom the policy was for. | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you incur any Nursing Home expenses for a qualifying individual (spouse, parent, etc.)?
If yes, please furnish a copy of the statement from the Nursing Home for 2020, detailing the charges and NYS assessment fee (if applicable). | <input type="checkbox"/> | <input type="checkbox"/> |

Itemized Deduction Information: (only answer if you will be itemizing – Total Deductions must be greater than \$24,800 for MFJ filers, \$12,400 for Single filers and \$18,650 for Head of Household).

If all items in this section do not apply, check the N/A Box, and skip to the next section: N/A

- | | | |
|---|--|---------------------------------------|
| Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, insurance premiums, hospital or medical bills, etc.)?
If yes, please provide the amounts if greater than \$4,000 Single (\$8,000) Joint | <u>Yes</u>
<input type="checkbox"/> | <u>No</u>
<input type="checkbox"/> |
| Did you make any cash or noncash charitable contributions greater than \$2,000?
If yes, please provide the detail of each item. If you are itemizing receipts are not necessary to provide to us but must be maintained. A list will suffice. | <input type="checkbox"/> | <input type="checkbox"/> |

If you do not itemize on Schedule A, you may qualify to take an additional deduction for Charitable Contributions of up to \$300. Did you make cash contributions greater than \$300? YES NO

If yes, was it greater than \$2,000? Yes- Amount: \$_____ NO

Income Information:

If all items in this section do not apply, check the N/A Box, and skip to the next section: N/A

- | | | |
|--|--------------------------|--------------------------|
| Did you have any foreign income or pay any foreign taxes during the year directly or indirectly, such as investment accounts, partnerships, or a foreign employer? If yes, please provide documentation. | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive any income from property sold prior to this year?
If yes, please provide documentation (such as amortization schedules with amounts received). | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you receive any unemployment during the year?
If yes, please provide Form 1099-G. (You must get from the NYS Unemployment website). | <input type="checkbox"/> | <input type="checkbox"/> |

To get the 1099-G go to www.labor.ny.gov and log into your account. Click on the labor online box, when the next page opens, scroll down to the Unemployment Insurance section, and click on the grey unemployment icon. The next page to open is Unemployment Insurance Benefits online, you will need to scroll down to the “Get your NYS 1099-G”, you will see the tax year 2020 then a box to click on that says Get your NYS 1099-G. This will bring up your form to be printed out. All unemployment is taxable so please make sure to include your 1099-G with your tax documents.

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ADDITIONAL INFORMATION CONTINUED

- Did you receive any disability income during the year?
 If yes, please provide documentation as to whether it was taxable or not.
- Did any of your life insurance policies mature, or did you surrender any policies?
 If yes, please provide Form(s) 1099-R.
- Did you receive any awards, prizes, hobby income, gambling, or lottery winnings?
 If yes, please provide Form(s) W2-G, 1099 MISC, or 1099 NEC.
- Do you expect a large fluctuation in income, deductions, or withholdings next year?
 If yes, please provide documentation.

Retirement Information:

- If all items in this section do not apply, check the N/A Box, and skip to the next section:* N/A Yes No
- Did you make any withdrawals from an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other retirement plan?
 If yes, please provide Form(s) 1099-R.
- Did you make any contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?
 If yes, and not managed by Cuddy Financial, please provide Form(s) 5498 or other documentation.

Education Information:

- If all items in this section do not apply, check the N/A Box, and skip to the next section:* N/A
- Did you, your spouse, or dependent(s) attend College in 2020?
 If yes, please provide Form(s) 1098-T issued by the college. Also, provide details of actual payments MADE in 2020 by including a statement of the student's account from the college. Receipts for any additional expenses, such as books, and supplies not purchased through the College should also be submitted.
Please note: Payments made to the college through student loans are considered qualifying payments for the Education Credit.
- Did you make any contributions to or withdrawals from an education savings or 529 Plan account?
 If yes, please provide a yearend statement and copy of the check.

Miscellaneous Information:

- If all items in this section do not apply, check the N/A Box, and skip to the next section:* N/A
- Did you utilize an area of your home for business purposes?
 If yes, please provide square footage of the home and the office, plus all expenses of owning the home.
- Did you retire or change jobs this year?
- Did you pay any individual as a household employee during the year?
 If yes, please provide documentation.
- Did you make energy-efficient improvements to your main home this year?
 If yes, please provide receipts and details.
- Were you or your spouse a volunteer firefighter or ambulance driver for all of 2020?
- Did you receive an Identity Protection PIN from the Internal Revenue Services or have you been a victim of Identity Theft? If yes, attach the IRS letter.
- Did you receive an inheritance in 2020?
 If yes, what was the amount? \$ _____
- Do you want to designate \$3 to the Presidential Election Campaign Fund?
 If yes, it will not change your tax or reduce your refund.

CLIENT ENGAGEMENT LETTER

PLEASE NOTE: WE CANNOT PREPARE YOUR TAX RETURN UNTIL WE RECEIVE THIS SIGNED FORM BACK.

Thank you for choosing Cuddy Financial Services to assist you with preparing your personal 2020 tax returns. This letter is to confirm our understanding of the terms and objectives of our tax service engagement and to clarify the nature and limitations of the tax services provided.

I will prepare your federal and state Individual Tax Returns for the current and subsequent calendar years. I will depend on you to provide the information needed to prepare complete and accurate returns. A Client Organizer and Questionnaire are enclosed to guide you through this process. The Organizer will help you avoid overlooking important information. By using it, you will contribute to the efficient preparation of your returns and help minimize the cost of our services. You represent that the information you are supplying is accurate and complete to the best of your knowledge. I may ask you to clarify some items but will not audit or otherwise verify the data you submit.

Fees for tax services will be at standard hourly rates for the time spent, plus out-of-pocket expenses, including computer processing charges. Hourly rates vary from \$85 to \$200 per hour depending on the type of services provided. There will be a minimum fee of \$200.00 for most tax returns. The minimum fee for children age 22 and under, will be \$75. A service fee will be charged on all accounts over thirty days due in the amount of 1.5% or \$5 per month, whichever amount is greater. Should it become necessary to pursue legal action to collect the fee, you agree to be responsible for such additional collection expenses.

As you know, your returns are subject to examination by the taxing authorities. In the event of an audit, you may be requested to produce documents, records, or other evidence to substantiate the items of income and deductions shown on a tax return. If an examination occurs, I will represent you, if you so desire; however, these additional services are not included in the fee for preparation of your returns. A separate Audit Retainer Engagement is available to qualified clients, whereby I will provide such representation and services for a nominal fixed fee retainer, provided that the Audit Retainer Agreement is in full force for the affected tax year and paid in full prior to the date of the Audit Notice. The Audit Retainer Engagement includes any tax notices you may receive. If the Audit Retainer Engagement is not chosen, a fee will be charged at our hourly rates to respond to notices sent from the IRS, New York State, or any other government agency.

It is important for you to know that the law imposes a penalty if a taxpayer makes a substantial understatement of tax liability. You should also know that IRS audit procedures will almost always include questions on bartering transactions and on deductions that require strict documentation such as travel expenses and expenses for business usage of autos and computers. In addition, all charitable contributions must have appropriate documentation to substantiate the deduction and it will be important to retain that documentation for verification purposes. In preparing your returns, I rely on your representations that I have been informed of all bartering transactions and that you understand and have complied with the documentation requirements for your expenses and deductions.

If, during the work, I discover information that affects your prior year tax returns, I will make you aware of the facts. However, I cannot be responsible for identifying all items that may affect prior year tax returns.

This letter will continue to apply to the preparation of the above returns, unless amended or terminated in writing by either of us. To affirm that this letter correctly summarizes your understanding of the arrangements for this work, please sign the enclosed copy of this letter in the space indicated and return it to us with your packet.

I appreciate this opportunity to serve you. If you have any questions or need additional information, please do not hesitate to call.

Very truly yours,



Daniel R. Cuddy, CPA

If the tax services and terms outlined above are in accordance with your understanding of our engagement, please sign this letter in the space provided below and return to my office. (Only one signature required - Taxpayer or Spouse may sign.)

Accepted By (Print Name): _____

Signature: _____ Date: _____



Consent for Use of Tax Return Information

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use your tax return information for purposes other than the preparation and filing of your tax return without your consent.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. Your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

Cuddy Financial Services and its tax preparers (the "Firm") request your consent to use your Tax Return Information which includes but may not be limited to, all communications with my Tax Preparer ("Preparer") and any information Preparer derives or generates from Tax Return Information in connection with my tax returns for the purpose of providing you with information about various tax planning strategies and financial services and products, which may include, but is not limited to: individual and business tax planning, estate and gift tax planning, business consulting, bookkeeping services, retirement planning, investment advice, investment products and services (e.g., stocks, bonds, mutual funds, insurance, and annuities) and long-term care and life insurance. Services are dependent upon the licenses held by your tax preparer. The Firm will distribute information in various ways including, but not limited to: newsletter, email, postal mail, website, phone, or other means of communication.

I understand that Preparer may use all of my Tax Return Information in connection with his/her affiliation with (a) Avantax Investment ServicesSM, (b) Avantax Investment ServicesSM (AAS), a registered investment adviser; and/or (c) affiliates of those entities (collectively, "Avantax"), all of which are headquartered at 3200 Olympus Blvd., Suite 100, Dallas, Texas 75019. Avantax does not offer, provide, or supervise tax advice or tax preparation services, and any services provided by Avantax will be pursuant to a written agreement directly with the relevant Avantax entity.

I understand that Cuddy Financial Services is not a registered broker-dealer or a registered investment adviser.

I acknowledge that if I make an investment through Avantax that Preparer will receive a part of any management fees, commissions, or other fees paid on investments I make. I understand that I am under no obligation whatsoever to follow any recommendations made or to purchase any other products or services offered by or through Preparer.

Daniel R. Cuddy CPA is affiliated with Avantax Wealth Management and its affiliates ("Avantax") as independent contractors solely for the purpose of providing clients with financial products and services.

I/we **consent** to the use of my/our tax return information for this purpose.

I/we **do not consent** to the use of my/our tax return information for this purpose.

The duration of this consent is three years from the date of signature, unless a more limited duration is specified here: I/we specify the duration of the above consent to be ___ years from the date of signature.

Taxpayer 1 Printed Name

Signature

Date

Taxpayer 2 Printed Name

Signature

Date

If the Firm also prepares tax returns for your minor children (under age 18), please print their names below. This consent also applies to their Tax Return Information.

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov.



Consent for Disclosure of Tax Return Information

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

Cuddy Financial Services and its tax preparers (the “Firm”) request your consent to disclose your Tax Return Information as described below.

Purpose One: Disclosure for Compliance with Securities Laws & Regulations

- **Why is my information being disclosed?** Daniel R. Cuddy CPA is affiliated with Avantax Wealth Management and its affiliates (“Avantax”) as an independent contractor for the purpose of providing clients with financial products and services. The securities laws and regulations require Avantax to capture, retain and supervise its financial services professionals’ communications related to Avantax’s business.
- **Where is my information being sent?** Avantax Wealth Management (“Avantax”) is composed of: (a) Avantax Investment ServicesSM, a registered broker-dealer; (b) Avantax Investment ServicesSM, a registered investment adviser; and (c) Avantax affiliates, all of which are headquartered at 3200 Olympus Blvd., Suite 100, Dallas, Texas 75019.
- **What information will be disclosed, and how?** Avantax captures, retains, and may review all electronic communications between you and the Firm, regardless of sender or recipient. These communications include your emails and attachments which contain Tax Return Information. Avantax will protect the confidential nature of this information by disclosing it only in response to lawful requests made by state or federal securities regulators, or otherwise as required by law.

I/we **consent** to the disclosure of my/our Tax Return Information for the purpose above.

I/we **do not consent** to the disclosure of my/our Tax Return Information for the purpose above.

Due to financial industry email archiving regulations, I understand that any Tax Return Information communicated to the Firm via email may be disclosed for oversight purposes, and **I will avoid emailing Tax Return Information in order to prevent this disclosure**. If I still choose to send information to the Firm via email, I agree to hold the Firm harmless for any disclosure to Avantax that occurs.

Purpose Two: Disclosure in Order to Discuss Tax Planning and Financial Products and Services with You

Why is my information being disclosed? To evaluate your financial situation and provide you with information about various tax planning strategies and financial services and products, which may include, but is not limited to: individual and business tax planning, estate and gift tax planning, business consulting, bookkeeping services, retirement planning, investment advice, investment products and services (e.g., stocks, bonds, mutual funds, insurance, and annuities) and long-term care and life insurance. Services are dependent upon the licenses held by your tax preparer.

Where is my information being sent? Avantax Wealth Management (“Avantax”) is composed of: (a) Avantax Investment ServicesSM, a registered broker-dealer; (b) Avantax Investment ServicesSM, a registered investment adviser; and (c) Avantax affiliates, all of which are headquartered at 3200 Olympus Blvd., Suite 100, Dallas, Texas 75019.

What information will be disclosed, and how? All of your Tax Return Information, including communications with the Firm and any information the Firm derives or generates in connection with your tax returns. You may request a more limited disclosure of your Tax Return Information.

Your Tax Return Information will be disclosed via financial planning or other software or systems owned by the Firm or by Avantax.

Avantax and its authorized third-party vendors will retain and store your Tax Return Information in hard copy and/or electronically as required by applicable regulations, or longer as determined in the sole discretion of Avantax.

[] I/we **consent** to the disclosure of my/our Tax Return Information for the purpose above.

[] I/we **do not consent** to the disclosure of my/our Tax Return Information for the purpose above.

Signatures

The duration of this consent is three years from the date of signature, unless a more limited duration is specified here: I/we specify the duration of the above consent to be ___ years from the date of signature.

_____	_____	_____
Taxpayer 1 Printed Name	Signature	Date

_____	_____	_____
Taxpayer 2 Printed Name	Signature	Date

If the Firm also prepares tax returns for your minor children (under age 18), please print their names below. This consent also applies to their Tax Return Information.

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov.

BANKING INFORMATION MUST BE COMPLETED AND OR UPDATED

If this section is not completed, Government refunds will be sent by check and all tax estimated payments will need to be mailed in with the voucher and check for payment due.

PLEASE CHECK THE APPROPRIATE BOX(S)

Checking Savings Individual Account Joint Account Business Checking

BANK NAME: _____ **ROUTING # :** _____
(9 Numbers)

ACCOUNT # : _____

If you owe taxes, do you want direct withdrawal from your bank account?

Yes, Date of Withdrawal _____ NO

If estimated tax payments are required, do you want them debited from your bank account on the due dates?

Yes No

INCOME TAX RETURNS –CHECKLIST

Do you have everything we need to complete your taxes? Please submit all documents listed below together via mail, SafeSend e-mail, fax or drop off.

____ TAX RETURN QUESTIONNAIRE (Yellow) – ALL QUESTIONS COMPLETED

____ COPY OF YOUR 2019 TAX RETURN (if we did not prepare your taxes last year.)

____ COPY OF FRONT AND BACK OF DRIVER’S LICENSES/STATE ID’S IF UPDATED IN THE LAST TWELVE MONTHS.

____ ESTIMATED TAX PAYMENTS

____ DEPENDENT INFORMATION

____ HEALTH INSURANCE FORM 1095-A

____ SIGNED CLIENT ENGAGEMENT LETTER

____ SIGNED CONSENT TO DISCLOSE

____ SIGNED CONSENT TO USE

____ BANKING INFORMATION FORM

____ FOR THOSE OF YOU WHO HAVE BROKERAGE ACCOUNTS: If you receive consolidated Brokerage 1099 Forms, they usually end up being amended in February. PLEASE WAIT until FEBRUARY 15th to submit your information to us. This will allow your Brokerage Firm time to file all required amendments.

____ CLIENT SOURCE DOCUMENTS (W2’S, 1095-A, 1099’s, ETC.)

____ COPIES OF IRS/TAX CORRESPONDENCE RECEIVED, IF APPLICABLE

____ INVOICES/DESCRIPTIONS OF IMPROVEMENT-RELATED PURCHASES, IF APPLICABLE (BUSINESSES AND LANDLORDS)

**PLEASE PROVIDE ALL THAT APPLY
AND USE THIS SHEET AS A TOOL TO GUIDE YOU
IN RETURNING THE REQUIRED DOCUMENTS.**