

Please write legibly when filling out this form.

Name: _____

Address: _____ **City:** _____ **State:** _____ **Zip:** _____

School District: _____ **County:** _____

Phone Home: _____ **Work:** _____ **Cell:** _____

Email: _____

Taxpayer Occupation: _____ **Spouse Occupation:** _____

| | Yes | No |
|---|-----|-----|
| 1. If you have a REFUND , would you like it deposited automatically into your bank account? | [] | [] |
| If you have a BALANCE DUE , would you like the amount automatically withdrawn from your account? | [] | [] |

Name of Bank: _____

Bank Routing Number: _____

Account Number: _____

| | Yes | No |
|-----------------------------|-----|-----|
| Is this a Checking account? | [] | [] |

| | Paper | PDF* |
|---|-------|------|
| Would you like a PAPER copy or electronic PDF copy of your return? (Please check one) | [] | [] |

*If PDF, our new encryption system is **Encyro**, **PLEASE** be on the lookout for an email from Encyro.
 **Please note that there is an additional charge for choosing more than one option or more than one copy.

2. Please provide name, date of birth, and social security number for yourself & all dependents (if you have not provided in the past).

| Name | Birth Date | Social Security Number |
|------|------------|------------------------|
| | | |
| | | |
| | | |

3. Due to NYS Regulations, we will need to obtain information off of your Driver's License to e-file all returns.

If your license has been **reissued** since last year or you are a new client, please complete the following:

| ID Number: | State | Expiration Date: | Issue Date: | Document Number: |
|------------|-------|------------------|-------------|------------------|
| | | | | |
| | | | | |

| | Yes | No |
|---|-----|-----|
| 4. Did you receive unemployment benefits in 2023? | [] | [] |

If yes, please provide a copy of your 1099-G. (<https://www.tax.ny.gov/pit/file/1099g.htm>)

| | Yes | No |
|--|-----|-----|
| 5. Did you contribute to an HSA (Health Savings Account) in 2023? If so, how much? (Please provide form 5498-SA) | [] | [] |

| | Yes | No |
|---|-----|-----|
| 6. Did you purchase a car, light truck, motor home or motorcycle in 2023? | [] | [] |

If yes, how much sales tax did you pay on the purchase?

| | Yes | No |
|--|-----|-----|
| 7. Did you purchase or sell a home in 2023? If yes, please provide a copy of your closing statement. | [] | [] |

| | Yes | No |
|---|-----|-----|
| 8. Do you have any financial assets or any other assets (properties, etc) located in a foreign country? | [] | [] |

| | Yes | No |
|--|-----|-----|
| 9. Have you had any credits disallowed or reduced in prior years? (You would have received a notice from the IRS or NYS) | [] | [] |

If yes, please provide copies of any notices.

| | Yes | No |
|---|-----|-----|
| 10. Did you buy, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency? | [] | [] |

If yes, we will need the date purchased and sold, the proceeds, and the cost basis.

| | Yes | No |
|--|-----|-----|
| 11. Did you, your spouse, and your dependents have health insurance for all of 2023? | [] | [] |

If yes, please check the applicable box below:

- Employer Marketplace/Obamacare (Please attach form 1095-A)
 Social Security/Medicare Fidelis/Medicaid Other _____

12. Did you or any of your dependents incur college education expenses for 2023? Yes No
 If yes, please provide name of the college, the dependent and the expenses paid.
 Expenses include tuition, textbooks & course materials. We need both the 1098-T AND detailed receipt of payment & charges from the college

| Dependent | Year in College | College Name | Amount Paid |
|-----------|-----------------|--------------|-------------|
| | | | |
| | | | |

13. Did you contribute to a New York 529 College Saving Plan in 2023? Yes No
 If yes, how much? (We will need year end statements showing contributions)

14. Did you make any purchases where you did not pay sales tax, such as through catalogs or online? Yes No
 If yes, please provide total amount of such purchases.
 (If you are unsure of the total, NYS provides a chart for calculation which is based on your adjusted gross income)

Would you like to use the chart provided by New York State? Yes No

15. Did your marital status change in 2023? (Married, divorced, separated, widowed) Yes No
 If yes, please specify?

16. Did you make any donations to charitable organizations during 2023? Yes No
 If yes, please provide amount for "Cash" donations:

and "Non Cash" donations :

*Please note that the IRS requires sufficient substantiation for cash and non-cash contributions valued at \$250 or more.

17. Did you sell any stock or investments during 2023? Yes No
 If yes, we will need the date each investment was purchased and the cost basis.

18. Did you receive gambling winnings of \$600.00 or more in 2023? Yes No If yes, please provide form W-2G

19. Did you receive a Property Tax Freeze Credit and/or STAR refund check from NYS in 2023? Yes No
 If yes, how much?

*If you are unsure, please logon to: www.tax.ny.gov/pit/property/credit-lookup.htm
 20. Did you and/or your spouse pay Long Term Care Premiums in 2023? Yes No
 If yes, how much?

21. Did you pay any estimated Federal or New York State tax payments in 2023? Yes No
 If yes, please provide amounts paid.

| Due Date: | Date Paid: | Federal | New York |
|-----------|------------|----------------------|----------------------|
| 04/18/23 | _____ | <input type="text"/> | <input type="text"/> |
| 06/15/23 | _____ | <input type="text"/> | <input type="text"/> |
| 09/15/23 | _____ | <input type="text"/> | <input type="text"/> |
| 01/16/24 | _____ | <input type="text"/> | <input type="text"/> |

**** Please note that the IRS will never call you directly. If you receive a call do NOT give them any of your personal information. ****

We will prepare your 2023 Federal and State income tax returns from information you provide us. We will make no audit or other verification of the data you submit, although it may be necessary to ask you for clarification of some of the information. It is your responsibility to provide all the information required for the preparation of complete and accurate returns. You should retain all documents, cancelled checks and other data that form the basis of income and deductions. These may be necessary to prove the accuracy and completeness of the returns to a taxing authority. You have the final responsibility for the income tax returns and, therefore, you should review them carefully before you sign them. Our fee for these services will be based upon the amount of time required at standard billing rates plus out of pocket expenses with a minimum of \$240. Fees for preparation of your tax return are due upon presentation of our invoice to you and no tax return may leave our office without payment, with NO exceptions. Interest will be added at a rate of one percent per month for invoices outstanding more than 30 days. If the foregoing fairly sets forth your understanding, please sign this form in the space indicated and return it to my office.

Signature: _____

Date: _____