CLIENT INFO FORMS

510 NW Mock Avenue   Blue Springs, MO 64014
Phone: (816) 229-2992   FAX: (816) 229-3280
Email: frontdesk@normastax.com

Filing Status: ☐ **Single** ☐ **Married (filing joint)** ☐ **Married (filing separate)** ☐ **Head of Household** ☐ **Dependent of another**

If you are new to Norma's Tax Service, please provide us with a copy of your 2024 or last filed tax return.

Best way to contact you: Phone ☐   Text ☐   Email ☐
(By providing cell phone and email information below, you are giving us permission to contact you via text or email.)

Legal Name ______________________	Spouse Legal Name ______________________
SSN ____________ Occupation ____________	SSN ____________ Occupation ____________
Cell Phone ____________ Birthdate ____________	Spouse Cell Phone ____________ Birthdate ____________
E-Mail ______________________	Spouse E-Mail ______________________
Driver's License # ____________ State ______	Driver's License # ____________ State ______
Issue Date ____________ Exp Date ____________	Issue Date ____________ Exp Date ____________

Address: ______________________ **City** ______________ **State** ________ **Zip** ________

Dependent Name (first and last)	Date of Birth (mm/dd/yy)	Dependents Social Security Number	# of months dependent lived in your home during 2025	Relationship to you

Provide required proof of residency for each dependent. Example: Health ins form, medical document, school record

Refund Options: ☐ Direct Deposit ☐ Bank Product-Tax prep and Bank fee ($74.90) are withheld from refund

Balance Due Options: ☐ Direct Withdrawal ☐ Pay On-line

For Direct Deposit or Direct Withdrawal only, please complete bank info: Checking ☐   Savings ☐

Bank Name ________________ Routing # ________________ Full Account # ________________

Tax Preparation fee Payment Options (Choose only one):

☐ Will pay in office when picked up ☐ Have fees withheld from refund ☐ Charge my Credit/Debit card account below

Credit Card Number ________/________/________/________   Expiration month/year ________/________   CVV Code ____________

NORMA'S TAX Service & ACCOUNTING

2025 Engagement Letter

Thank you for choosing Norma's Tax Service to assist with your taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services you have hired us to provide.

We will prepare your **2025** federal and state income tax returns only. This includes form 1040 and all other schedules and attachments, including schedules relating to self-employed income and rental properties. Other tax obligations are your responsibility and not covered under this engagement. We will depend on you to provide the information we need to prepare complete and accurate returns. A questionnaire and other documents are provided for specific information. Completing these forms will assist us in making sure you are well served promptly at a reasonable fee. You represent that the information you are supplying to us is accurate and complete to the best of your knowledge and that you have disclosed all relevant facts affecting the returns. We will not verify the information you give us; however, we may ask for additional clarification of some information.

We have made reasonable inquiries to complete appropriate forms related to tax payments, unemployment, payroll credits and deferrals, and ERC/EIDL loans. However, if audited, the taxpayer is responsible for proof and verification of these items.

We will perform limited accounting services only as needed to prepare your tax returns. Other accounting services will be billed at an hourly rate. Our work will not include procedures to find defalcations or other irregularities. Personal expenses should not be included in business expense deductions. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will, of course, inform you of any material errors, fraud, or other illegal acts we discover.

Should we encounter instances of unclear tax law, or of potential conflicts in the interpretation of the law, we will outline the reasonable courses of action and the risks and consequences of each. We will ultimately adopt, on your behalf, the alternative you select. The law imposes penalties when taxpayers underestimate their tax liability. Please call us if you have concerns about such penalties.

Our fees are due and payable upon presentation. To the extent permitted by state law, an interest charge may be added to all accounts not paid within thirty (30) days.

We will return your original records to you at the end of this engagement. You should securely store these records, along with all supporting documents, canceled checks, etc., as these items may later be needed to prove accuracy and completeness of a return. We will retain digital copies of your source documents and our work papers for your engagement for five years, after which these documents will be destroyed.

Our engagement to prepare your 2025 tax returns will conclude with your signature and our subsequent submittal of your tax return (if e-filing) or with the delivery of the completed returns to you (if paper-filing). You have the final responsibility for the income tax returns. You should review them carefully before you sign them. If you have not selected to e-file your returns with our office, or we are unable to e-file your returns, you will be solely responsible to paper file the returns with the appropriate taxing authorities.

By signing on page 3, I authorize my tax preparer to use my tax calculations to answer any questions I have. In addition, the IRS permits you to authorize us to discuss, on a limited basis, aspects of your return for up to one year after the return's due date. Your consent to such discussion is authorized by your signature as part of this engagement.

NORMA'S TAX Service & ACCOUNTING

2025 ANNUAL TAX QUESTIONNAIRE

Please check all that apply to you and provide relative documentation

Household Information

Did you/spouse live in US more than 6 months ☐ Yes ☐ No
Everyone in your household is US Citizen? ☐ Yes ☐ No
☐ I am unmarried with the highest household income
☐ Have Marketplace insurance for 2025 (1095-A)
☐ Work or live in KCMO
☐ Have had past credit(s) disallowed (EIC, CTC, Education)
☐ Do you or your spouse have an IPPIN? **Provide letter**

Dependent Information

☐ Paid for daycare or pre-taxed dependent care benefits?
If yes, how many children did you pay for? _______
(need statement with EIN & address of daycare provider)
☐ College tuition/books paid to qualifying university for you or your dependents? 1098T REQUIRED! Has the student been convicted of a felony? ☐ Yes ☐ No
☐ Contributed or withdrew from a 529 Plan? (1099Q)

Income/Adjustments/Credits

☐ Did you have overtime or tip income
☐ 1099K income-Venmo, Square, Credit cards or cash apps
☐ K-1 from Partnership, S-Corporation, Trust or Estate
☐ Unemployment income
☐ Interest, dividend or investment/stock income with 1099s
☐ Social Security or disability income (1099SSA)
☐ Rollovers, IRA or Retirement distributions (1099R)
☐ Receive or pay alimony (not child support)
We will need the date of divorce/modification
☐ Gambling, online gaming and/or sports wagering income
☐ Contribute to an IRA or Retirement plan other than through employer?
☐ Install new HVAC, water heater, insulation, solar, geothermal unit, or exterior doors/windows? We will need the manufacturer ID# found on your invoice
☐ Student loan interest paid for yourself or dependent(s)
☐ Educator expenses (max of $300)
☐ 2025 HSA distribution (1099-HSA) or contributions?
All distributions used for medical expenses? ☐ Yes ☐ No
☐ At any time during 2025, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?
☐ Foreign bank accounts, income, assets, or property
☐ Bankruptcy, foreclosure or cancellation of debt

Itemized Deductions

☐ Did you donate cash/check to a qualified charity?
☐ If you are over age 72 1/2, did you use a QCD to make a charitable contribution?
☐ Mortgage interest on primary or second home used to buy, build or improve your home - Form 1098 required!
☐ Real estate and/or personal property tax paid in 2025
☐ Long Term Care (Nursing Home) Insurance
☐ Pay directly for Health Insurance outside of Medicare/employer provided

Miscellaneous

☐ Did you make any quarterly or annual estimated tax Pre-payments for individual taxes in 2025?
☐ Contribute $3 to the presidential election campaign Fund (or to any state trust funds)

Do you have a Self-Employed Business, Rental Property(ies), or Farm Income? If yes, you must complete form B1.

NOTES TO PREPARER:

By signing below, I/We verify that the information contained in the three (3) page Norma's Client Info Forms to be complete and accurate. I/We also understand and agree to the terms and working relationships as outlined on these forms.

_______________________________ ____________
Primary Taxpayer signature **Date**

_______________________________ ____________
Spouse signature (if applicable) **Date**