



RETURNING CLIENT INFO FORMS

619 NW R.D. Mize Road 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

Taxpayer (Please Print)
 Full Name _____
 Last 4 of SSN _____ Occupation _____
 Taxpayer Cell Phone _____
 Taxpayer E-Mail _____
 Only if your driver's license expired since you were last here
 Issue Date _____ Exp Date _____ State _____

Spouse (Please Print)
 Full Name _____
 Last 4 of SSN _____ Occupation _____
 Spouse Cell Phone _____
 Spouse E-Mail _____
 Only if your driver's license expired since you were last here
 Issue Date _____ Exp Date _____ State _____

By providing cell phone and email information above, you are giving us permission to contact you via text or email.

Current Address _____

City _____ State _____ ZIP _____

Full name of Dependent	Birthdate	SSN	Relationship to you	# of months lived in your home during 2022
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Refund Options: Direct Deposit Mail Refund Bank Product (Tax prep and Bank fees are withheld from refund)
Please complete pages E1-E3 if you choose this option

Balance Due Options: Direct Withdrawal Mail Check or Pay On-line

For Direct Deposit of refunds or Withdrawal of balances due, complete bank info: Checking Savings (Provide voided check OR)

Bank Name _____ Routing # _____ 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 _____

Notify me by: Phone Email Portal I would like to review return with preparer

I would like a paper copy of my completed return I would like an electronic copy of my completed return

I would like to pre-schedule my appointment for next year



2022/2023 Engagement Letter

Thank you for choosing Norma's Tax Service to assist with your taxes. We continually look for ways to serve you better and give you a quality experience. 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 **2022** 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 COVID tax calculations (stimulus payments, unemployment, CRD taxation and repayments, payroll credits and deferrals, and PPP/ 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 2022 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 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.



ANNUAL TAX INFO QUESTIONNAIRE FOR 2022 TAX YEAR

All information is **REQUIRED** by IRS regulations, *thank you!*
Please check **ALL** that apply and provide necessary documentation.

Household Information

- How many people lived in your household (include self) more than 6 months? ____ How many had income? ____
- Did you/spouse live in US more than 6 months Yes No
- Everyone in your household is U.S. Citizen? Yes No
- Please provide proof of residency for each dependent you are claiming!!!
- I am unmarried with the highest household income
- Have Marketplace/Obamacare insurance for 2022
- Work or live in KCMO
- Have had past credit(s) disallowed (EIC, CTC, Education)

Dependent Information

- Paid for daycare or pre-taxed dependent care benefits? If yes, how many children did you pay for? ____
- College tuition/books paid to qualifying university for you or your dependents? 1098T required! Has the student been convicted of a felony? Yes No

Income/Adjustments/Credits

- Received any 1099K's
- Unemployment income
- Social Security or disability income (1099SSA)
- Rollovers, IRA or Retirement Acct distributions (1099R)
- COVID Related Retirement Distributions received in 2020 Paid back in 2022 taxed in 3yr spread
- Interest, dividend or investment/stock income with 1099s
- Student loan interest paid for yourself or dependents
- Teacher classroom expenses \$ ____
- 2022 HSA distribution (1099-HSA).
- At any time during 2022, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?
- Foreign bank accounts, foreign income, foreign assets, foreign property or online gaming
- Receive or pay alimony (not child support) Date of divorce/modification ____
- I have gambling income & written win/loss record
- Bankruptcy, foreclosure, or cancellation of debt

Deductions

- Did you donate cash/check to a qualified charity?
- 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 2022
- Long Term Care (Nursing Home) Insurance
- Self Employed Health Insurance

Miscellaneous

- Did you make any quarterly or annual estimated tax pre payments for individual taxes in 2022?
- Contribute \$3 to the presidential election campaign Fund (or to any state trust funds)

Business, Rental, Farm Income

- Do you have income from a self-employment business, farm, rental property? If you mark yes to this box, you **MUST complete pages B1.**

NOTES FOR 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