



# RETURNING CLIENT INFO FORMS

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Phone: (816) 229-2992 FAX: (816) 229-3280

Email: [frontdesk@normastax.com](mailto:frontdesk@normastax.com)

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

**Please Print:**  
**Taxpayer :**  
 Full Name \_\_\_\_\_  
 Last 4 of SSN \_\_\_\_\_ Occupation \_\_\_\_\_  
 Taxpayer Cell Phone \_\_\_\_\_  
 Taxpayer E-Mail \_\_\_\_\_  
 Only if your driver's license expired in 2021:  
 Issue Date \_\_\_\_\_ Exp Date \_\_\_\_\_ State \_\_\_\_\_

**Please Print:**  
**Spouse:**  
 Full Name \_\_\_\_\_  
 Last 4 of SSN \_\_\_\_\_ Occupation \_\_\_\_\_  
 Spouse Cell Phone \_\_\_\_\_  
 Spouse E-Mail \_\_\_\_\_  
 Only if your driver's license expired in 2021:  
 Issue Date \_\_\_\_\_ Exp Date \_\_\_\_\_ State \_\_\_\_\_

**Current Address** \_\_\_\_\_

**City** \_\_\_\_\_ **State** \_\_\_\_\_ **ZIP** \_\_\_\_\_

**DEPENDENT INFORMATION** - Dependents claimed last year that you are claiming again this year. Remember that YOU MUST PROVIDE PROOF OF RESIDENCY FOR EACH DEPENDENT CLAIMED.

<u>Name</u>	<u>#of months lived in your home</u>	<u>Name</u>	<u># of months lived in your home</u>
_____	_____	_____	_____
_____	_____	_____	_____

**NEW** Dependents for 2021 (Provide a copy of the social security card for each new dependent, or we can make a copy in the office.)

<u>Name</u>	<u>SSN</u>	<u>Date of Birth</u>	<u>Relationship</u>	<u># of months lived in your home</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**Refund Options:**  Direct Deposit  Mail Refund  Bank Product where tax prep fees are withheld

For Direct Deposit:  Checking  Savings Attach voided check OR Bank Name \_\_\_\_\_

Routing Number \_\_\_\_\_ Account Number \_\_\_\_\_

**Payment Options** (for tax preparation fees):

Will pay when picked up  Have fees withheld  Use my Credit/Debit card when return is completed (by providing account # you are giving permission to charge your tax preparation fees to this account.)

Credit Card Number \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ Expiration month/year \_\_\_\_\_ / \_\_\_\_\_

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



## 2021 /2022 Communication Release

We respect your privacy and we will not sell your e-mail address, physical address, phone number, or any other personal and financial information with any outside source. In connection with this engagement, we may communicate with you via text or email transmission. We may also share your contact information with a third- party company hired by Norma's to communicate with you regarding appointment times, open files, etc. As these can be intercepted and read, disclosed, or otherwise used or communicated by an unintended third party or may not be delivered to each of the parties to whom they are directed and only to such parties, we cannot guarantee or warrant that emails and texts from us will be properly delivered and read only by the addressee. Therefore, we specifically disclaim and waive any liability or responsibility whatsoever for interception or unintentional disclosure of emails transmitted by us. All email attachments will be encrypted as much as our software allows.

The current administration and the IRS require us to provide you a copy of Form 9325 acknowledging the IRS's receipt and acceptance of your electronically filed tax return. By **NOT** providing your email address, you are declaring that you do not wish to receive this or any other documents electronically. Under current tax law your email is not required to be part of your tax return. Unless otherwise directed we are not providing your email as part of your tax return.

Your initial below approves the noted email and designates that we shall have no liability for any loss or damage to any person or entity resulting from the use of email transmission including any consequential, incidental, direct, indirect or special damages, such as loss of revenues or anticipated profits or disclosure or communication of confidential or proprietary information. This agreement expires one year from the signature date. We appreciate your confidence in us. Please call if you have questions.

**Initial below:**

\_\_\_\_\_ I am not providing Norma's Tax Service with my(our) email address on page 1, therefore acknowledging That I(we) are not requesting to receive the information described above.

\_\_\_\_\_ I (We) have provided Norma's Tax Service with e-mail address(s) on page 1

# ANNUAL TAX INFO QUESTIONNAIRE FOR 2021 TAX YEAR

All information is **REQUIRED** by IRS regulations, *thank you!*

## 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
- Number of dependents you can claim for 2021 \_\_\_\_\_
- Everyone in your household is U.S. Citizen?  Yes  No
- There are changes for spouse or dependent(s)  Yes  No
- I am unmarried with the highest household income
- Have Marketplace/Obamacare insurance for 2021
- Work or live in KCMO
- Have had past credit(s) disallowed (EIC, CTC, Education)

## Dependent Information

- Advanced child tax credit payments: # of children you received payments for \_\_\_\_\_ Amount you received \$ \_\_\_\_\_, Amount spouse received \$ \_\_\_\_\_
- Paid for daycare or pre-taxed dependent care? 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

- March/April 2021 Stimulus pymt received \$ \_\_\_\_\_ (3<sup>rd</sup> pymt - \$1400/each, must match IRS records exact)
- Unemployment income
- Rollovers, distributions from retirement account OR Social Security/disability income
- COVID Related Retirement Distributions received in 2020  Paid back in 2021  taxed in 3yr spread
- Interest, dividend or investment/stock income with 1099s
- Student loan interest paid for yourself or dependents
- Teacher classroom expenses \$ \_\_\_\_\_
- 2021 HSA distribution (1099-HSA).
- At any time during 2021 did you receive, sell, exchange or otherwise dispose of any financial interest in any virtual currency?
- Foreign bank accounts, foreign income, foreign assets, foreign property or online gaming
- U.S. Savings Bonds cashed.
- 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.

## Refund and Payment Options:

- I would like my 2021 tax refund(s) direct deposited
- I wish to pay 2021 tax balance due by direct withdrawal
- I will pay fees for having my taxes prepared to Norma's Tax Service with cash, check or credit/debit card
- I would like the fees for having my taxes prepared (by Norma's Tax Service) taken out of my refund (I understand that by choosing this option there is an additional bank fee, and must **complete pages E1, E2, E3 and/or E4**)
- Contribute \$3 to the presidential election campaign Fund (or to any state trust funds)

## Deductions

- Qualified charitable donations w/2021 receipt(s)
- 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 2021
- Total out of pocket paid for: medical exp \$ \_\_\_\_\_ health ins \$ \_\_\_\_\_ Long Term care ins \$ \_\_\_\_\_

## Miscellaneous

- Did you make any quarterly or annual estimated tax pre payments for individual taxes in 2021?

## Business, Rental, Farm Income

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

**By signing below, I/We verify that the information contained in the four (4) 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



## 2021/2022 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 **2021** 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 tax payer 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 2021 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.