

DROP OFF TAX INFORMATION

General Information

Full Name			
Spouse's Full Name			
Did your martial status change in 2023?	<input type="checkbox"/> Yes <input type="checkbox"/> No		
Phone Number			May we text? <input type="checkbox"/> Yes <input type="checkbox"/> No
Email Address			
Physical Address			
<i>*If this is a new address, date of move</i>			
Occupations	Husband	Wife	

Dependent Information

Full Name	SSN	Birthdate	Relationship	Months reside in home in 2023

****If new dependent birth certificate and social security card is required.**

Direct Deposit Information

Name of Bank	<input type="checkbox"/> Checking Acct <input type="checkbox"/> Savings Acct	
Routing Number	Account Number	

Questionnaire- Please Respond to each question

		YES	NO
At any time in 2023 did you sell, send, exchange, or otherwise acquire any financial interest in any virtual currency?			
Were you or your spouse permanently or totally disabled in 2023?	<input type="checkbox"/> Yourself <input type="checkbox"/> Spouse		
Did anyone in your household attend college in 2023? If yes, please attach form 1098T and account statements.			
Did you pay student loan interest? If yes, attach form 1098-E.			
If you are a Pre-K-12 educator, how much did you spend on classroom supplies?			
Did you contribute money to any churches or charities?	Amount		
Did you make any energy efficient home improvements: energy star doors or windows, heat pump, heat pump water heaters, biomass stoves and boilers, or conduct a home energy audit? If yes, please attach documentation.			
Did you install any solar, wind or geothermal property to your home? If yes, please attach documentation.			
Did you purchase a plug in electric vehicle? If yes, please attach documentation.			
Are you a retired correctional officer, law enforcement officer, fire, rescue or emergency services personnel or forest/park/wildlife ranger?			
Are you a member of a volunteer fire department?			
Did you receive any funds through Paypal, Venmo, CashApp, or a credit card processor? If yes, did you receive a 1099-K form? **Please check your account to see if one was issued and if so attach. IRS will be matching these forms**			
Did you have any foreign income or pay any foreign taxes in 2023?			
At any time during 2023, did you have an interest in or a signature or other authority over a bank account, or other financial account in a foreign country?	Name of Country		

Attach Documentation if you:

- Received Form 1095-A (health insurance marketplace statement)
- Contributed to or received distributions from a HSA (health savings account)
- Contributed to a traditional or ROTH IRA.

Are you a member of a LLC or a shareholder in a S-corp? New beneficial ownership information reporting required through fincen.gov. This is crucial to complete before year-end. This is only to inform you of the requirement, we are unable to assist in any way.

ENGAGEMENT LETTER & PRIVACY POLICY NOTICE

MESSICK'S TAX ASSOCIATES, INC.

Print full name & spouse if applicable

Initial / Date

I/We have engaged you to prepare my/our income tax returns, including federal/state as applicable for the year ended December 31, 2023. In that respect, I/WE state that, to the best of my/our knowledge and belief.

- I understand that it is my responsibility to provide all the information necessary to complete the returns. I will retain for five years all the documents, receipts, cancelled checks and other records to substantiate the items of income and expense claimed on the returns.
- I understand that you will not audit or otherwise verify any information and that you may require clarification or additional information.
- I have provided true, correct, and complete information regarding my income as listed on the submitted Forms W-2, 1099 and/or written summaries. I have included all income received during the year, including rentals, business and gig income including cash received, unemployment compensation, sales of property, withdrawals from investments, barter, jury duty pay, lottery/gambling winnings, alimony, etc.
- I have provided true, correct, and complete information regarding amounts I have provided to you to claim as tax deductions and have maintained written documentation supporting all amounts, including logbooks and receipts. I fully understand that upon IRS audit a logbook is required to substantiate the auto expense deduction for rental, business and charitable mileage.
- I have no foreign financial accounts, trusts, or businesses or any other type of foreign income. If you have a financial interest in any foreign accounts you may also be responsible for filing Form FinCen 114. I have no crypto currency transactions except as indicated in the information I have provided to you. I accept responsibility for informing you if I believe that I fall into one of the above categories and I agree to provide you with information necessary to prepare the appropriate forms. Messick's Tax Associates, Inc. assumes no liability for penalties associated with the failure to file or untimely filing of any of these forms.
- I will contact you as soon as practical if I receive any letters from the IRS or other taxing authorities concerning these tax returns.
- I understand penalties and interest may be imposed on late, underpaid, or incorrect returns.
- I will contact you as soon as practical if I discover additional information that will change my/our tax returns. I understand additional charges may apply.
- I understand if a question arises regarding the interpretation of tax law and a conflict exists between the tax authorities' interpretation of the law and other supportable positions, you will use your professional judgement in resolving the issues. I understand that you are not responsible for disallowed deductions or the inclusion of additional unreported income or any resulting taxes, penalties or interest.
- I understand fees will be due and payable upon completion of these returns and that additional services will not be performed until the invoice for these services is paid in full.
- I understand the invoice will be based upon your standard billing rates. A non-refundable deposit may be requested.
- I have reviewed my return for any inaccuracies prior to electronic filing as I am verifying that all information on the return is true and accurate with my signature including all bank account and

routing numbers for direct deposit. Messick's Tax Associates, Inc. or our employees are not responsible for incorrect information once a signed return is submitted for electronic filing.

- I understand I will be charged an additional fee to respond to any letters or requests from the IRS or other taxing authorities. I understand that, in the event of preparer error, I am responsible for any additional tax that may be due. Messick's Tax Associates, Inc. liability is limited to interest and penalties up to the date of discovery. Sometimes the IRS will abate penalties. We can assist but can offer no guarantees of success.

It is the policy of Messick's Tax Associates, Inc. to keep all information that we collect from you confidential. We maintain physical, electronic, and procedural safeguards to guard your nonpublic personal information. Our employees are bound by internal confidentiality policies and are subject to disciplinary action for any policy violations.

We do collect nonpublic personal information about you from the following sources:

- Information we receive from you on tax preparation organizer, worksheets, and Federal and State tax reporting forms and form other documents we use in tax preparation.
- Information about your transactions with us, our affiliates, and others.
- Information we may receive from outside agencies such as banks and brokerage houses.

We do not disclose any nonpublic personal information about our clients or former clients to anyone, except as instructed by you in writing or as required by law as listed below.

- Requirements to comply with Federal, State, or local law.
- Requirements to comply with national, state, or local licensing rules.
- Requirements to disclose information in response to legal subpoenas.
- Items you permit or request us to disclose, as authorized by you in writing.
- Information that you authorize us to disclose by signing this engagement letter to electronically file your tax return.

I/WE have read the above engagement letter and privacy policy and understand my/our responsibilities with regard to income tax preparation.

Accepted by:

Taxpayer Signature

Date

Name – Print _____

Spouse Signature

Date

Name – Print _____