



CFA
Consultants, LLC

2023 Tax Info Sheet

▪ Legal Name of Client(s): _____

▪ Has any info changed? address filing status (single, HOH, married, widowed)

If so, please provide details: _____

▪ Estimated Payments - Taxes (**Need receipts/proof of payments**)

Fed Q1\$ _____ Q2\$ _____ Q3\$ _____ Q4\$ _____

State Q1\$ _____ Q2\$ _____ Q3\$ _____ Q4\$ _____

▪ Applied 2022 refund payments to 2023\$ (if applicable) _____

▪ Did your dependents file tax returns? (i.e., under 24yr- did they check box that they are dependent?)

▪ Custody changes? _____ (need documentation)

▪ Capital loss carry forward? _____

▪ Did you live outside of Arizona for more than 3 months? _____,
If Yes, Where and how many months? _____

▪ Did you start new business/rental (if YES, see SCH C/E forms)? _____

▪ Any changes to child/ren status? _____

Name	Soc. Sec. #	Date of Birth	Is child over 18?	Relationship	#months lived with you

▪ How do you want materials returned to you? Pick Up By Mail (Add \$10)

IRS PIN: _____
(If applicable)

Bank INFO: _____ (must confirm last 4 digits of acct.# if same as last year)

New Bank Info: Routing # _____ Acct # _____

▪ **Payment:** Payment for tax services is due prior to e-filing your final return. All fees and signatures must be enacted within 3 days of the final return being sent to you.

- Will you be paying tax prep fees via ACH from info provided above? _____ (Signed authorization form required)

***Please provide a front & back copy of all taxpayers' driver's licenses with this form.**

WE MUST HAVE THIS FORM TO START TAX RETURN

Scope of Engagement. The services to be provided in connection with the Engagement will encompass all services normally and reasonably associated with this type of engagement. The term of this Engagement is one year from the date of this letter or until services are completed, whichever occurs first.

We agree to prepare your tax return, inquire of any outstanding issues and give advice on strategies, and efile your return.

We will represent you professionally and vigorously before the appropriate administrative agencies. Please understand that final decisions rest with the taxing agency and we cannot guarantee any result. We will have no liability by reason of our failure to achieve a desired result under the items described above. Furthermore, our fee does not include the services to appeal, if necessary, a decision of the IRS (or state agency) with respect to the Engagement. Should you make the decision to appeal a decision of the IRS (or state agency), we would be delighted to assist you and can provide you an estimate of our appeal fees at your request. Our fee also does not include making calls to the IRS on your behalf to inquire about status, responding to or advising on agency notices, or checking statuses for you.

Confidentiality. For our relationship to succeed, it is essential for you to provide us with all factual information reasonably relevant and material to the subject matter of the Engagement. Please be aware that failure to disclose the nature, source, and extent of any assets, liabilities, income, or expense may ultimately invalidate any agreement between you and a taxing agency.

Communication Between Us. We will communicate with you by email, phone, fax, and any other reasonable method. An express condition of the Engagement is that you remain in contact with us and timely provide any documentation we or any taxing agency may request. If we or any taxing agency attempt to contact you during the Engagement or to request documentation from you but do not receive a response from you within 10 days, we reserve the right to interpret such silence or inaction to mean that you have terminated the Engagement.

Communication between Us, You and IRS. You will not be required to talk to, meet, or deal with revenue officers during the course of our Engagement. While some clients may feel a need to contact the revenue officer directly, we strongly encourage you to refrain from contacting the revenue agent and instead work through our tax professionals.

Other Client Duties. You agree to file returns as required by any agreements, settlements, or compromises that are made with the IRS or other taxing agency. You further agree to stay current on all future tax liabilities as they become due. Failure to stay current with any and all tax liabilities will be cause for us to terminate this agreement as it would affect our ability to represent you.

Tax Preparer. CFA Consultants LLC engages with contract tax preparers. Your tax return may be prepared, reviewed and signed by another EA or CPA, as listed on the signature pages of your return. Client agrees to allowing CFA Consultants to share your data and tax documents with contractors.

I agree to engage with the preparer in connection with my tax return and pay all associated fees linked to my return within 3 days.

Signature: _____ Date: _____

Signature: _____ Date: _____