

Client Information Sheet for 2025 Tax Return

(please complete information on both sides of this sheet and include this worksheet with your tax paperwork)

First name

TAXPAYER:		M.I.	
		Suffix	
Social security #			
US Citizen or Legal Resident?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
/ /		/ /	
Occupation			
Email address			
Home phone		()	
Cell phone		()	

Last name

Social security #

Date of birth/death

Occupation

Email address

Home phone

Cell phone

SPOUSE:		M.I.	
		Suffix	
Social security #			
US Citizen or Legal Resident?		<input type="checkbox"/> Yes	<input type="checkbox"/> No
/ /		/ /	
Occupation			
Email address			
Home phone		()	
Cell phone		()	

>>> Please be prepared to provide a copy of your drivers license or state ID card to help prevent a delay in your refund. <<<

Mailing address: Street Apt/Suite
Zip code City State

Dependants: (Include your children under age 19 (or under age 24 if a full time student) who lived with you even if you are not claiming them as a dependant)

Claim as a dependant for 2025?	# of month lived with you in 2025?	First name	Initial	Last name	Social security number	Birthdate	Relationship	US Citizen or Legal Resident?
<input type="checkbox"/> Yes	<input type="checkbox"/> No							<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Yes	<input type="checkbox"/> No							<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Yes	<input type="checkbox"/> No							<input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> Yes	<input type="checkbox"/> No							<input type="checkbox"/> Yes <input type="checkbox"/> No

If you are due a refund, how do you want to receive it?

Apply to next year's estimates
 Direct deposit*

If you owe taxes, how do you want to pay them?

I'll schedule my own payment at IRS.gov
 Direct debit from my bank account*

*Please be able to provide a copy of a check or other verification for accounts used in direct deposit or direct debit:

Account Type: Checking Savings

Institution Name: _____

Routing Number: _____

Account Number: _____

Amount spent on internet, mail order or other out of state purchases where sales tax was not paid? \$ _____

How would you like to receive your tax return:

Paper copy
 Picked up in office
 Mailed to me (extra fees apply)
 Digital copy (discount applies)
 Uploaded to the portal
 I'll bring a flash drive

Is there a trusted person we may contact if we are unable to reach you, or if we have concerns about your ability to complete or manage your tax engagement?

Name: _____

Phone Number: _____

This authorization is optional and does not permit disclosure of your tax return information.

PERSONAL INFORMATION

Yes No Have you, your spouse or a dependent applied for or received an Identity Protection PIN from the IRS? (Include IPPIN notice letter)

Yes No Did any births, adoptions, marriages, divorces, or deaths occur in your family since last year?

Yes No Did you get married, legally separated or divorced in 2025? Date of occurrence: ____/____/2025

Yes No Did you purchase or sell your principal residence or did your address change? Date of Move: ____/____/____

Yes No Are either you or your spouse being claimed (or are eligible to be claimed) as a dependent on anyone else's return?

Yes No Were either you or your spouse in the military or National Guard during 2025?

Yes No Are you or your spouse a disabled veteran? Percent of disability _____ %

Yes No Do you (or your spouse) have an ownership interest in an LLC?

(please complete information on both sides of this sheet and include this worksheet with your tax paperwork)

Name _____

Phone _____

DEPENDENTS

Yes No Are there any changes in your dependents from last year?

Yes No Did you pay expenses for the care of your child or other dependent so you could work? (Provide name, address, SSN/EIN and amount paid)

Yes No Did you pay post-secondary education expenses for your dependent children or yourself? (Include form(s) 1098-T)

Yes No Are all of your dependents either US residents or citizens?

INCOME (In 2025, did you or your spouse have any of the following?)

Yes No Wages? (include form(s) W-2)

Yes No Did you receive any distributions from a retirement plan? (Include form(s) 1099-R)

Yes No Non-employee compensation? (include form(s) 1099-MISC or 1099-NEC)

Yes No Did you receive a 1099-K from a third-party network such as Paypal or Venmo?

Yes No Interest or dividend income? (include form(s) 1099-INT, 1099-DIV or brokerage company's consolidated 1099)

Yes No Gambling income? (include form(s) W-2G). Be sure to include any gambling expenses.

Yes No Social security or Railroad Retirement benefits? (include form(s) SSA-1099 or RRB-1099)

Yes No Disability income? (include form(s) W-2 or 1099)

Yes No Unemployment compensation? (include form(s) 1099-G)

Yes No Child Support or Alimony received? Date of alimony agreement? ____ / ____ / ____

Yes No Did you receive tip income NOT reported to your employer? Amount \$_____

Yes No Did you receive, or expect to receive, a Schedule K-1 (or substitute K-1) from a trust, estate, partnership, or S corp?

Yes No Did you start or acquire a new business or purchase new rental property in 2025? (provide details)

Yes No Did you receive a distribution from an HSA, Archer MSA or Medicare Advantage MSA (Include form(s) 1099-SA)

Yes No Did you sell any non-business items for more than the item cost you? (provide details)

Yes No Did you have any debt cancelled or forgiven during 2025? (Include form(s) 1099-A or 1099-C)

Yes No Did you receive any non-taxable sources of income? (provide details)

Yes No Did you receive any income not reported in this Organizer? (provide details)

FOREIGN REPORTING

Yes No Did you have an interest in or signature authority over a financial account in a foreign country?

Yes No Were you the grantor or transferor to a foreign trust?

Yes No Did you receive income from a foreign source or pay taxes to a foreign government?

DEDUCTIONS

Yes No Did you receive tip income or overtime pay in 2025? (Include your final pay stub with YTD info)

Yes No Did you pay interest on an auto loan for a vehicle purchased in 2025? (Include form 1098-VLI)

Yes No Did you make a contribution to a retirement plan? (401(k), IRA, SEP, SIMPLE, etc.) other than through payroll deduction?

Yes No Did you make any contributions to an HSA (Health Savings Account) in 2025? (Include form 5498-SA)

Yes No Did you make any solar or geothermal energy efficient improvements to your home during 2025?

Yes No Did you make energy efficient improvements to your home in 2025? (windows/doors, furnace, gas water heater, etc)

Yes No Did you purchase a qualifying electric vehicle in 2025?

Yes No Did you pay any student loan interest in 2025? (Include form 1098-E)

Yes No Did you pay health insurance premiums directly (not through payroll deduction)?

Yes No Did you make any contributions to a 529 education savings account?

Yes No Did you acquire health insurance through the healthcare marketplace exchange? (Include form 1095-A)

Yes No Did you make any federal, state or local estimated tax payments for 2025?

Yes No Did you pay alimony? Date the alimony agreement? ____ / ____ / ____ SSN of recipient? _____

OTHER QUESTIONS

Yes No At any time during 2025 did you receive, sell, send, exchange or otherwise acquire any interest in virtual currency?

Yes No Did you make gifts totaling more than \$19,000 to any one person (including the cash value of gifts) in 2025?

Yes No Have you included all of your income with this worksheet?

Yes No Do you have documentation to support all deductions that you are claiming?

Yes No Have you signed the Engagement Letter that came with this worksheet?

>>> Please provide copies of all tax related forms such as W2's, 1099's and documents to support deductions. <<<

To the best of my knowledge the enclosed information is correct and includes all income, deduction, and other information necessary for the preparation of this year's income tax returns for which I have adequate records.

Sign: _____

Date: _____



ABJ & Associates Inc
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TAX PREPARATION ENGAGEMENT LETTER

Thank you for selecting our firm to prepare your 2025 income tax returns. This letter outlines the services we will provide and your responsibilities in relation to the preparation of your 2025 Income Tax Return.

Scope of Services:

We will prepare your federal and state tax returns based on the information you provide. While our work will not include procedures to discover irregularities or inaccuracies in the data, we may request clarification or additional information to ensure your returns are accurate and complete.

Your Responsibilities:

It is your responsibility to provide all necessary information related to your income and deductions and to respond to our inquiries promptly. This will allow us to complete your returns accurately and by the appropriate due dates. Please ensure that all income is reported on your return, as we cannot independently verify missing income.

At the conclusion of this engagement, we will return your original documents. You are responsible for maintaining appropriate records, such as official tax documents, receipts, and substantiation for deductions, as well as purchase and sales information for assets. While we may make copies of relevant documents, we are under no obligation to retain them and cannot guarantee that we will have them on file. You will receive one copy of your tax return, either in paper or digital format, and it is your responsibility to retain this copy for future reference. All documents in our possession will be destroyed after three years.

Please make sure your paperwork arrives in a clean and presentable condition. For electronic uploads, ensure all images and PDFs are clear, complete, and easy to read—no blurry corners or missing pages, please! (PDFs are preferred over JPEGs whenever possible.) If paper documents are heavily wrinkled, dirty, or arrive with strong odors (such as smoke, pets, or other mysterious fragrances), a special handling fee may apply.

Portal:

Our TaxDome portal is designed to make tax preparation as convenient and efficient as possible. Through the portal, you can securely upload and access your documents, communicate directly with our team, and electronically review and sign your tax returns. By using TaxDome, you'll enjoy enhanced security, real-time updates, and a simplified process that saves you time and effort. Simply provide us with your email address, and we'll get you set up right away.

Timing:

To ensure the timely preparation of your tax returns, we require that you provide all necessary documentation and information no later than March 15th. If your paperwork is submitted after this date, we cannot guarantee the completion of your returns by the filing deadline.

If we determine that an extension of time is necessary to avoid late filing penalties, this signed engagement letter authorizes us to file an extension on your behalf. Please note that an extension grants additional time to file your return but does not extend the time to pay any taxes owed. Therefore, it is important to provide us with your information as soon as possible to facilitate accurate tax planning and minimize any potential interest or penalties.

Review and Filing:

You are responsible for reviewing your returns before they are filed to ensure that all income is correctly reported and that you have substantiation for your deductions. Filing your returns by the due dates is also your responsibility. Please note that we will not e-file your return until we have received your signed authorization.

Confidentiality:

We are committed to maintaining the confidentiality of your information. We restrict access to your data and implement physical, electronic, and procedural safeguards to protect it.

Post-Filing Assistance:

If your returns are selected for review or audit by taxing authorities, we will be available to assist or represent you if desired. Please note that our fees for preparing your returns do not include time for assistance during a review or audit.

Fees and Billing:

Our fees for preparing your returns are based on our standard billing rates plus any out-of-pocket expenses. An initial deposit of \$50 is required to begin processing your return. This deposit will be applied to your final invoice upon completion when the return is finalized by September 15th 2025 or within 30 days of this engagement, whichever is later. Payment is due upon presentation of our invoice, and your return will not be e-filed until payment is received. Our fee structure is based on a forms-based pricing schedule for tax preparation, plus an hourly rate for any data compilation needed to complete the forms. The pricing schedule may be adjusted based on the complexity of your return.

Tax return preparation fees do not include accounting or bookkeeping services. However, they do cover reasonable email and telephone contact throughout the year. Additional fees will apply for in-office consultations, extended email and telephone communications, income or tax liability forecasting, tax agency correspondence, and audit representation. Our current rate schedule is available at www.abjtax.com.

Limitations of Engagement:

We will perform only the accounting services necessary to prepare your tax returns. Our work will not include procedures to identify defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, although we will inform you of any such issues that we may discover during the course of our work.

Our engagement to prepare your tax returns will conclude with the delivery of the completed returns to you (if filing by paper) or your signature and our subsequent submission of your tax return (if filing electronically). If we are unable to e-file your returns, you will be solely responsible for filing them with the appropriate taxing authorities. Please review all tax return documents carefully before signing them.

If this letter accurately reflects your understanding of our agreement regarding the preparation of your tax returns, please sign in the space provided and return it to us. Thank you once again for choosing our firm to prepare your tax return. We appreciate your business.

Sincerely,
Amy Jack, EA

Accepted by:

Taxpayer:

Spouse:

Sign: _____

Sign: _____

Print: _____

Print: _____

Date: _____

Date: _____