



YOUR TRUSTED BUSINESS ADVISORS

NEW or EXISTING CLIENT TAX INTAKE FORM 2021

Stimulus Checks must be reconciled on your 2020 Tax return, incorrect information may delay your refund!

1st Stimulus _____ 2nd Stimulus _____

Drop Off or Appointment Date: _____

Are you a returning Client? YES NO

Name: _____ Best Number to call: _____

Taxpayer Number: _____ Spouse Number: _____

Preferred method of contact for questions on return: CALL TEXT EMAIL

Email Address: Taxpayer _____ Spouse: _____

Would you like a Secure PDF Copy of your return by Email? YES NO

I have included the following with this Drop Off:

- Signed Engagement Letter (2nd Page) MANDATORY
- Copy of Taxpayer & Spouse (if applicable) Driver's License MANDATORY (Email picture or scanned copy to business@premieraccountingassociates.com)
- Do you have health insurance with the Marketplace? (healthcare.gov) YES NO
- I want any refund to be directly deposited;

Bank Name: _____ Acct #: _____
Copy of voided check

"We are All About the Numbers"

: 717-477-3284 : 717-754-0054 : info@premieraccountingassociates.com

Premier Accounting Associates, LLC. || 915 North Mountain Road, Suite A, Harrisburg, PA 17112



January 2021

Engagement Letter for Individual Income Tax Services,

To minimize the possibility of a misunderstanding between us, we are setting forth pertinent information about the services we will perform for you.

We will prepare your 2020 Federal and requested state income tax returns from information which you will furnish to us. We will not audit or otherwise verify the data you submit, although we may ask you to clarify some of it or furnish us with additional data.

If you request, we will also prepare your estimated tax voucher for 2021. Please advise us if you anticipate substantially lower income for 2021, a change in withholding taxes, or a significant increase in your 2021 income. Should this occur later in the year, please advise us at that time.

It is your responsibility to provide all the information required for the preparation of complete and accurate returns. We will provide you with questionnaires and an organizer to guide you in gathering the information. You represent that the information that you are supplying to us is accurate and complete, to the best of your knowledge, and that your expenses for meals, entertainment, travel, gifts, charitable contributions, and vehicle use are supported by records as required by law. You should retain all the documents, cancelled checks and other data that form the basis of the returns to a taxing authority. You have the final responsibility for the income tax returns and therefore, you should review them carefully before you sign and file them.

We appreciate the opportunity to be of service to you and believe this letter accurately summarizes the significant terms of our engagement. If you have any questions, please let us know. If you agree with the terms of our engagement as described in this letter, please sign in the space indicated below and return it to us. This letter will continue in effect until canceled by either party.

Sincerely,

Premier Accounting Associates

ACKNOWLEDGEMENT

This letter correctly sets forth our understanding.

Signature: _____ Date: _____

Signature: _____ Date: _____

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What do you need to bring to do your taxes?

1. Form W2 from all employers last year
2. SSA-1099 for social security benefits
3. 1099 R for withdrawals from a retirement account
4. 1099-Misc for payment from people who were not your employer (i.e., self-employed)
5. 1099-K for credit card payments received (selling on eBay, driving for Uber, etc.)
6. Form 1099-Int for interest received from banks or stocks
7. Form 1099-DIV for any brokerage accounts (i.e., Edwards Jones, TD Ameritrade)
8. Mortgage Interest Statements and Property Taxes paid in last year for Itemized Schedule
9. Taxpayers & Dependents Social Security Cards
10. Rental property Income & Expenses
11. Expenses for any self-employed activities for last year
12. 1098T for college expenses and out of pocket cost for books and required class items, this includes a computer and software costs.
13. Student Loan Interest
14. HUD statement if you bought or sold a property last year
15. Gambling winnings from the lottery or a casino where you had to give your social security number upon claiming the winnings
16. Cancellation of Debt-1099-C, these will be issued if a credit card company or loan company “forgive” any debt you had and no longer hold you liable for the debt.
17. Anything that you received that states, “IMPORTANT TAX DOCUMENTS”, bringing more is far better than not having what we need.

We are looking forward to servicing your tax needs this year.

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