

Please provide email address and cell numbers for each. If you elect to sign digitally we will need that info !!

Phone # \_\_\_\_\_

Phone # \_\_\_\_\_

Name \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

Driver's License # \_\_\_\_\_

Driver's License # \_\_\_\_\_

Issue Date \_\_\_\_\_

Issue Date \_\_\_\_\_

Expiration Date \_\_\_\_\_

Expiration Date \_\_\_\_\_

Birthdate \_\_\_\_\_

Birthdate \_\_\_\_\_

EMAIL ADDRESS \_\_\_\_\_

EMAIL ADDRESS \_\_\_\_\_

**ENERGY CREDITS ARE BACK IN. IF YOU INSTALLED NEW HVAC, WATER HEATER, WINDOWS, EXTERIOR DOORS, OR INSULATED YOUR HOME LET US KNOW. WE WILL NEED A COPY OF THE INVOICE.**

**HEALTH INSURANCE:** If you have (or had) insurance through the exchange (Obamacare website) you should have received a 1095-A form from your insurance provider. You must provide us with this form before we can complete your income tax return

**Did Taxpayer or Spouse or dependents attend College or take any College courses?**

Yes \_\_\_\_\_

No \_\_\_\_\_

**We will need 1098-T form from the college attended, and a copy of payment statements from the college.**

#### **Direct Deposit Info**

Name of Bank/Credit Union \_\_\_\_\_

Routing # \_\_\_\_\_

Account # \_\_\_\_\_

Checking Account \_\_\_\_\_

Savings Account \_\_\_\_\_

**Earned Income Tax Credit (Please note the following stipulations may apply to the other credits listed below in the "Due Diligence" section.)**

Earned Income Credit (EIC) is a refundable credit available to qualifying low income earners. To qualify for this credit, several conditions must be met: \* Relationship - the dependent child must be your son, daughter, stepchild, foster child, grandchild, brother, sister, niece, or nephew. \* Age - the child must be under age 19 at the end of 2024; under age 24 at the end of 2024 if a student; or any age if permanently and totally disabled. \* Residency - the child must have lived with you in the U.S. for more than half of 2024. \* Tiebreaker Rules - These rules determine if a taxpayer may claim a child as a qualifying child for the EIC when the child meets the definition of a qualifying child for more than one person. \* If only one of the persons is the child's parent, the child is treated as the qualifying child of the parent. \* If the parents file a joint return together and can claim the child as a qualifying child, the child is treated as the qualifying child of both of the parents. \* If the parents do not file a joint return together but both parents claim the child as a qualifying child, the child is treated as the qualifying child of the parent with whom the child lived for the longer period of time during the year. If the child lived with each parent for the same amount of time, the child is treated as the qualifying child of the parent who had the higher adjusted gross income (AGI) for the year. \* If no parent can claim the child as a qualifying child, the child is treated as the qualifying child of the person who had the highest AGI for the year. \* If a parent can claim the child as a

qualifying child but no parent does so, the child is treated as the qualifying child of the person who had the highest AGI for the year, but only if that person's AGI is higher than the highest AGI of any of the child's parents who can claim the child. \*Please understand as your 2024 tax preparer, we must make sure you are complying with the requirement for the Earned Income Credit. We or the IRS may request additional documentation (medical records, school records, birth certificates, business records if self-employed, etc.) from you to help verify your ability to claim the EIC credit. It is a CRIMINAL OFFENSE to report false information to claim the Earned Income Tax Credit. The IRS Criminal Investigation Division is actively monitoring tax returns for fraud. Be aware, if you report fraudulent information on your return to obtain the Earned Income Tax Credit, you may lose the ability to qualify for the credit in the future and you could possibly be charged criminally!

**DUE DILIGENCE FOR: EARNED INCOME CREDIT, AMERICAN OPERTUNITY CREDIT, CHILD TAX CREDIT, ADDITIONAL CHILD TAX CREDIT, CREDIT FOR OTHER DEPENDENT, & HEAD OF HOUSEHOLD**

Have you previously claimed EIC/CTC/ACTC or AOTC and those credits been disallowed or reduced by the IRS?

Yes \_\_\_\_\_ No \_\_\_\_\_

Please list all dependent children: Please do not list Social Security numbers on this page. We will verify that info with you personally.

Dependent Name	Birthdate	Relationship	Months lived with you (0 for divorce)
1) _____			
2) _____			
3) _____			
4) _____			

If any of the above dependents do not live with you due to a divorce, do you have a signed 8332 form from the custodial parent? Yes \_\_\_\_\_ (if Yes, we will need a copy) No \_\_\_\_\_ (if No, a signed 8332 form is required). If divorce was post 1984 and pre 2009 a copy of the divorce decree may qualify

If the child lives with you, have you signed an 8332 releasing the right to claim the dependent? Yes \_\_\_\_\_ No \_\_\_\_\_

If any child listed above is not your child, please explain where the parents are: List child's name from above and explanation

\_\_\_\_\_

\*\*\*Upon request, proof of relationship of any dependent(s) will be required to comply with IRS requirements and guarantee accuracy on your Income Tax Return.\*\*\*

As the Taxpayer, I hereby certify that I have read and that all information herein provided to my preparer to be accurate and truthful to the best of my knowledge and ability. I also request my tax preparer to use the information given herein to prepare, complete, and, if desired, file my Federal and State Income Tax Returns.

Taxpayer's Signature	_____	Date	_____
Spouse's Signature	_____	Date	_____

Bowshier Tax Service LLC

1510 State Route 55

Urbana, Ohio 43078, Ph. 937-653-3064

**General Engagement Letter for Individual Tax Return Preparation**

This letter is to inform you, the taxpayer, of the services we will provide you, and the responsibilities you have for preparation of your tax return.

***Tax Return Preparation Services***

- We will prepare your 2024 Form 1040, *U.S. Individual Income Tax Return*, and applicable state tax return(s) based on information you provide. Services for preparation of your returns do not include auditing or verification of information provided by you.
- This engagement does not include any audit or examination of your books or records. In the event your return is audited, you will be responsible for verifying the items reported.
- Assisting you in your compliance with the Corporate Transparency Act, including beneficial ownership information (BOI) reporting, is not within the scope of this engagement.
- The tax return preparation fee does not include bookkeeping. Additional fees apply for these services.
- Fees charged for tax return preparation do not include audit representation or preparing materials to respond to correspondence from taxing authorities.
- Preparation fees do cover limited assistance and consultation during the year.
- The engagement to prepare your 2024 tax returns terminates upon delivery of your completed returns and original documents to you. Please store your supporting documents and your tax returns in a secure place for at least seven years. You may be assessed a fee if you request a duplicate copy in the future.

***Taxpayer Responsibilities***

- You agree to provide us all income and deductible expense information. If you receive additional information after we begin working on your return, you will contact us immediately to ensure your completed tax returns contain all relevant information.
- You affirm that all expenses or other deduction amounts are accurate and that you have all required supporting written records. In some cases, we will ask to review your documentation.
- You must be able to provide written records of all items included on your return if audited by either the IRS or state tax authority. We can provide guidance concerning what evidence is acceptable.
- You must review the returns carefully before signing to make sure the information is correct.
- Fees must be paid before your tax returns are delivered to you or filed for you. If you terminate this engagement before completion, you agree to pay a fee for work completed. A retainer may be required for preparation of returns.

**Signatures.** By signing below, you acknowledge that you have read, understand, and accept your obligations and responsibilities and that you understand our responsibilities in preparing your tax returns as explained above. For a joint return, both taxpayers must sign.

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*Taxpayer*

*Spouse*

*Date*

**Privacy Policy.** The nature of our work requires us to collect certain nonpublic personal information about you from various sources. We collect financial and personal information from applications, worksheets, reporting statements, and other forms, as well as interviews and conversations with our clients and affiliates. We may also review banking and credit card information about our clients in the performance of receipt of payment. Under our policy, all information we obtain about you will be provided by you or obtained with your permission.

Our firm has procedures and policies in place to protect your confidential information. We restrict access to your confidential information to those within our firm who need to know in order to provide you with services. We will not disclose your personal information to any third party without your express written permission, except where required by law. We maintain physical, electronic, and procedural safeguards in compliance with federal regulations that protect your personal information from unauthorized access. Please contact us with any questions regarding our privacy policy.