

# Susan Does Taxes LLC

## New Client Tax Organizer

### Personal Information

Taxpayer	Name <i>Last Name, First Name MI</i>	SSN ###-##-####	Date of Birth MM/DD/YYYY		
Spouse	<i>Last Name, First Name MI</i>	###-##-####	MM/DD/YYYY		
Address	<i>Street, City, ST ZIP</i>				
Taxpayer	Occupation	Email	Daytime Phone ###-###-####	Evening Phone ###-###-####	Cell Phone ###-###-####
Spouse			###-###-####	###-###-####	###-###-####

### Marital Status (end of 2022)

- Married  Single  Married Filing Separately  
 Widow(-er); if spouse died in 2022, enter date of death: MM/DD/YYYY

### Dependent Information

Full Name of Dependent	Relationship	Date of Birth	SSN	Months In Home	Disabled	Full-Time Student	Childcare Expenses
<i>Last Name, First Name MI</i>	<i>son/daughter/etc.</i>	<i>MM/DD/YYYY</i>	<i>###-##-####</i>	<i>#/12</i>	<i>Y/N</i>	<i>Y/N</i>	<i>\$</i>
<i>Last Name, First Name MI</i>	<i>son/daughter/etc.</i>	<i>MM/DD/YYYY</i>	<i>###-##-####</i>	<i>#/12</i>	<i>Y/N</i>	<i>Y/N</i>	<i>\$</i>
<i>Last Name, First Name MI</i>	<i>son/daughter/etc.</i>	<i>MM/DD/YYYY</i>	<i>###-##-####</i>	<i>#/12</i>	<i>Y/N</i>	<i>Y/N</i>	<i>\$</i>
<i>Last Name, First Name MI</i>	<i>son/daughter/etc.</i>	<i>MM/DD/YYYY</i>	<i>###-##-####</i>	<i>#/12</i>	<i>Y/N</i>	<i>Y/N</i>	<i>\$</i>
<i>Last Name, First Name MI</i>	<i>son/daughter/etc.</i>	<i>MM/DD/YYYY</i>	<i>###-##-####</i>	<i>#/12</i>	<i>Y/N</i>	<i>Y/N</i>	<i>\$</i>

Dependents required to file a return:

### Virtual Currency

- YES  NO - At any time during 2022, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency?

### Account Information for Deposits/Withdrawals

Bank Name	Routing Number	Account Number	Checking?	Savings?	Use for Deposit?	Use for Withdrawal?
<i>Primary Account</i>	<i>#####</i>	<i>#####</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Secondary Account</i>	<i>#####</i>	<i>#####</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### Identification Information

#### Taxpayer Identification

Type of Photo ID  Driver's License  State-Issued Photo  
ID Number \_\_\_\_\_  
State Issuing ID \_\_\_\_\_  
Issued Date *MM/DD/YYYY* *MM/DD/YYYY*  
Expiration Date *MM/DD/YYYY* *MM/DD/YYYY*

#### Spouse Identification

Type of Photo ID  Driver's License  State-Issued Photo  
ID Number \_\_\_\_\_  
State Issuing ID \_\_\_\_\_  
Issued Date *MM/DD/YYYY* *MM/DD/YYYY*  
Expiration Date *MM/DD/YYYY* *MM/DD/YYYY*

Additional Information, Comments, or Questions?

Subject: Preparation of Your 2022 Tax Returns

Thank you for choosing Susan Does Taxes to assist you with your 2022 taxes. This letter confirms the terms of our engagement with you and outlines the nature and extent of the services we will provide.

We will prepare your 2022 federal and state and local tax returns as applicable. We depend on you to provide the information needed to prepare complete and accurate returns. We may ask you to clarify some items but will not otherwise verify the data you submit. An organizer is enclosed to help you collect the data required for your return - helping you to avoid overlooking important information. By using it, you will contribute to the efficient preparation of your returns.

We will perform accounting services only as needed to prepare your tax returns. Our work will not include procedures to find defalcations or other irregularities. Accordingly, our engagement should not be relied upon to disclose errors, fraud, or other illegal acts, though it may be necessary for you to clarify some of the information you submit. We will inform you of any material errors, fraud, or other illegal acts we discover.

In an instance of a potential conflict with tax law, we will outline the reasonable courses of action and the risks and consequences of each. Ultimately, we will adopt, on your behalf, the option you select.

If you have not selected to e-file your returns with our office, you will be solely responsible to file the returns with the appropriate taxing authorities. Review all tax-return documents carefully before signing them. Our engagement to prepare your 2022 tax returns will conclude with the delivery of the completed returns to you, or with e-filed returns, with your signature and our subsequent submission of your tax return. Be sure to store these records, along with all supporting documents, in a secure location. We will retain digital copies of your records and our work papers from your engagement for up to seven years, after which these documents will be destroyed.

To affirm that this letter correctly summarizes your understanding of the arrangements for this work, sign the enclosed copy of this letter in the space indicated and return it to us in the envelope provided.

Thank you for the opportunity to be of service. If you have any questions, contact our office at 724-242-7722.

*Susan Rozsas Short*  
**Susan Does Taxes, LLC**

Taxpayer  
(print) \_\_\_\_\_ (signature) \_\_\_\_\_ (SSN last 4) \_\_\_\_\_

Spouse  
(print) \_\_\_\_\_ (signature) \_\_\_\_\_ (SSN last 4) \_\_\_\_\_

Date \_\_\_\_\_

*Both spouses must sign for preparation of joint returns.*