

# Susan Does Taxes LLC

## NEW CLIENT TAX ORGANIZER

**REMEMBER TO REVIEW AND SIGN THE AGREEMENT FOR PREPARING YOUR 2024 TAXES**

### PERSONAL INFORMATION

LAST NAME, FIRST NAME AND MIDDLE INITIAL (ADD ANY SUFFIX – JR/SR/III/IV ETC.)		FULL SSN	BIRTHDATE	
Taxpayer	<i>Last Name, First Name MI</i>			
Spouse	<i>Last Name, First Name MI</i>			
Address	<i>Street, City, ST ZIP</i>			
OCCUPATION	EMAIL	DAYTIME PHONE	EVENING PHONE	CELL PHONE
Taxpayer				
Spouse				

### MARITAL STATUS (AS OF DECEMBER 31, 2024)

Married  Single  Married Filing Separately  Widow(-er); if spouse died in 2024, enter date of death: *MM/DD/YYYY*

### Dependent Information

FULL NAME	RELATIONSHIP TO TAXPAYER	BIRTHDATE	SSN	MONTHS IN HOME - 2024	DISABLED (Y/N)	FT STUDENT (Y/N)	CHILDCARE EXPENSES (\$)

DEPENDENTS REQUIRED TO FILE THEIR OWN RETURN:

### VIRTUAL CURRENCY

At any time during 2024, did you receive, sell, exchange, or otherwise dispose of any financial interest in any virtual currency?  YES  NO

### ACCOUNT INFORMATION FOR DEPOSITS/WITHDRAWALS

BANK NAME	ROUTING NUMBER	FULL ACCOUNT NUMBER	CHECKING?	SAVINGS?	USE FOR DEPOSIT?	USE FOR WITHDRAWAL?
1)			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2)			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### IDENTIFICATION INFORMATION

	TAXPAYER IDENTIFICATION	SPOUSE IDENTIFICATION
Type of State Issued ID	<input type="radio"/> Driver's License <input type="radio"/> Other <input type="radio"/> N/A	<input type="radio"/> Driver's License <input type="radio"/> Other <input type="radio"/> N/A
State Issuing ID		
ID Number		
Issued Date		
Expiration Date		

ADDITIONAL INFORMATION, COMMENTS, OR QUESTIONS?

## AGREEMENT FOR PREPARING YOUR 2024 TAX RETURNS

Thank you for choosing Susan Does Taxes to assist you with your 2024 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 2024 federal and state and local tax returns as applicable. **Your accurate tax return is dependent upon you providing all necessary information including pertinent tax forms and demographic updates.** 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 2023 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, **and return signed with your tax documents.**

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.*