4379 Cleveland Road
Wooster, Ohio 44691
(330) 345-8635
or (800) 852-0313

Dear Client,

Here are the forms you will need for your appointment:

- When downloading the forms, print them all single sided - NOT DOUBLE SIDED.
- Please fill out the Client Information Sheet, Page 1 and Page 2, completely. Be sure to read each question carefully.
- Also, we need you to fill out the "Earned Income Due Diligence Questions for Drop Offs"- even if none of it applies to you, we still need you to sign at the bottom of the page so we can verify that you have read it.
- Read and sign the General Engagement Letter for Individual Tax Return Preparation
- On the Tax Credit Questionnaire, answer Yes, No, or N/A to all questions.
- I have also included information about our "Sleep-At-Night" IRS Protection Guarantee Program-please read this and determine if you want to take advantage of this program.
- Bring a copy of a current ID for taxpayer and spouse (if applicable)
- Bring a voided check if you are choosing to receive your refund by direct deposit

Please bring these completed forms back with your tax information. There are a couple additional forms that we will have you complete upon your arrival at the office, so please allow time for this when stopping in.

Thanks,

Terry M. Sustar

Terry M. Sustar, EA

Fax: (330) 345-8644 | www.DataViewTax.com | Email: taxprep@dataviewtax.com

Please Print

DataView TAX SERVICE

Office Use Only
Disclosures?
YES NO
Init:

2022 TAX YEAR CLIENT INFORMATION

I. PRIMARY TAXPAYER INFORMATION

PRIMARY TAXPAYER NAME (**Usually husband**)
(record name as shown on Social Security card):

_____
(First Name) (Middle) (Last)

Social Security #: _____-_____-_____

Date of Birth: MM_____DD_____YEAR_____

Occupation: _____

Day Ph # (_____) _____ ☐Work ☐ Home

Cell Phone # (_____)_____

Can we use texts to communicate with you? ☐ Yes ☐ No

Email Address: _____

Your email address will never be sold or rented out. It is for our internal use only.

II. SPOUSE INFORMATION

SPOUSE NAME (**Usually wife**)
(record name as shown on Social Security card):

_____
(First Name) (Middle) (Last)

Social Security #: _____-_____-_____

Date of Birth: MM_____DD_____YEAR _____

Occupation: _____

Day Ph # (_____) _____ ☐Work☐Home

Cell Phone # (_____)_____

Can we use texts to communicate with you? ☐ Yes ☐ No

Email Address: _____

Your email address will never be sold or rented out. It is for our internal use only.

III. STATUS (circle one): Single / Head of Household (Provided Housing) / Married / Married Filing Separate / Widowed

IV. ADDRESS

STREET ADDRESS: _____

CITY_____STATE_____ZIP_____

COUNTY_____ SCHOOL DISTRICT_____ **DO YOU LIVE IN CITY LIMITS? (Circle One): YES NO**

V. DEPENDENTS (Children & Others - Not Spouse)

Please complete the following as applicable:

Name (as shown on SS card)	Social Security Number	Relationship to taxpayer	# Months lived in home during 2022	Date of Birth	Claiming for 2022? Y or N

Did You, Your Spouse, & Your Dependents receive Health Insurance through the marketplace www.HealthCare. Gov (The Exchange) YES / NO

How do you want to receive your Refund:

☐ **Fees Taken Out of Check** (extra $ fee) **OR** ☐ **Direct Deposit** (Need voided check) **OR** ☐ **IRS Mail It To Me**

VI. SIGNATURE

ALL INFORMATION I HAVE GIVEN IS TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE. I ACKNOWLEDGE THAT I HAVE SIGNED CONSENT TO USE AND CONSENT TO DISCLOSE FORMS AND THEY WILL REMAIN ON FILE. THEY ARE IN EFFECT UNTIL I NOTIFY YOU IN WRITING OR AM NO LONGER YOUR CLIENT. IF I CHOOSE NOT TO COMPLETE THE RETURN AFTER TAX INFORMATION HAS BEEN ENTERED INTO THE COMPUTER BY A TAX PREPARER, I UNDERSTAND THAT I WILL BE CHARGED A $50.00 CONSULTATION FEE.

SIGNATURE: _____Date_____

Turn Form Over For More Information

PLEASE READ AND ANSWER EVERY QUESTION

If you or your spouse at any time during 2022 had any of the following, please circle Yes or No - and inform your preparer:

	Circle:		If yes, please provide:
Can you be claimed as a dependent on someone else's tax return?	**YES**	**NO**	
Did you make any ROTH IRA (other than at work)contributions in 2022?	**YES**	**NO**	
Do you or your spouse have any *FOREIGN BANK* ACCOUNTS?	YES	NO	
Do you sell, exchange, gift, or otherwise dispose of any Crypto this year?.....	YES	NO	
Did you receive a 1095-A from the Healthcare Market Place?	YES	NO	

Did you purchase anything on the internet and **not** pay sales tax on the purchase?	YES	NO	Amount $_____
Pay college tuition expenses? …….	YES	NO	All 1098-T's
Sell stock, mutual fund, or other securities?	YES	NO	All 1099-B forms
Own your own business or were you self-employed? ……...	YES	NO	Income Statemnt & All 1099-Misc
Use a portion of your home exclusively for business? ……...	YES	NO	Total Sq ft of house and Sq ft of exclusive office space
Do you own rental property?	YES	NO	
Receive royalties? ……...	YES	NO	All 1099 forms
Sell your home? ……..	YES	NO	All 1099-S forms
Sell any other property (equipment, land, etc.)? …….	YES	NO	
Did you make estimated tax payments?	YES	NO	(Amounts & To Whom)
Have an interest in a partnership, S-corporation, estate or trust?	YES	NO	All K-1 forms
Operate a farm? ……..	YES	NO	
Receive installment payments on property sold?	YES	NO	
Have income as a minister? ....……	YES	NO	

Did you move into or out of any other city or School District in 2022? ..... YES/ NO

Date Moved: ____/____/_____ City/SD Name Moved From:_____

Did you move into or out of any other states in 2022? ..... YES/ NO

Date Moved: ____/____/_____ Name of State Moved From:_____

Questions for possible Tax Credits:

	Yes	No
1. Are you providing us with all the income and expense information that you have?	☐	☐
2. Was your main home (and/or your spouse's if married) in the US for more than half the year?	☐	☐
3. Were you or your spouse a non-resident alien for any part of the year?	☐	☐
4. Could you or your spouse be a qualifying child of another person for the year?	☐	☐
5. Are you or your spouse eligible to be claimed as a dependent on anyone else?	☐	☐

If something doesn't apply to you mark the N/A box

	Yes	No	N/A
6. If you qualify for Head of Household, or any of the following credits: Earned Income Credit, Child Tax Credit, Additional Child Tax Credit, or American Opportunity Tax Credit, ***can you provide documentation (Child's Birth Certificates, 1098-T's, proof of address, etc,), if needed by IRS, to verify that you are entitled to Head of Household status and/or to claim the dependents?***	☐	☐	☐
7. Do you understand that you may not claim the EIC if you haven't lived with the child for over half the year, even if you supported the child? (child support)	☐	☐	☐
8. Were any credits disallowed or reduced in a prior year?	☐	☐	☐
9. Is there a Form 8332 Release of Exemption by Custodial Parent?	☐	☐	
9a. If yes, has the Form 8332 release been canceled? Yes ☐ No ☐			

We have reviewed and understand the following tie breaker rules.

Tie Breaker Rules: ***Ignore this rule if you file a joint return.***

Only one person can use the same qualifying child. If a child is the qualifying child of more than one person, only one person can claim the child as a qualifying child for any of the following tax benefits:

- EITC
- Dependency Exemption for the Child,
- Child tax credit,
- Head of household filing status,
- Credit for child and dependent care expenses, and
- Exclusion for dependent care benefits.

Taxpayer Signature:_____Date**:** _____

Spouse's Signature:_____ Date:_ _____

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

- **We will prepare your federal and state tax returns based on information you provide. Services for preparation of your return 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.**
- **The tax return preparation fee does not include bookkeeping.**
- **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 tax returns terminates upon delivery of your completed returns and original documents to you. Please store your supporting documents and copies of your tax returns in a secure place for at least seven years.**
- **You give us permission to file an extension for you if the return will not be ready for the filing deadline**

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 return carefully before signing to make sure the information is correct.**
- **Fees must be paid before your tax return is 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 is required for preparation of late returns.**
- **We can withdraw as your preparer, without penalty or cost, if you are deemed to be non-compliant to the above.**

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. You acknowledge that you have read and signed both the Consent to Use and the Consent to Disclose forms and they are in effect until you notify us in writing or you are no longer our client. For a joint return, both taxpayers must sign.

- **You should keep a copy of your tax return and any related tax documents. You may be assessed a fee if you request a copy in the future.**

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, work- sheets, 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 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.