

2022 Tax Client Information

First Name: _____ Last Name: _____ DOB: _____

Social Security Number: _____ Occupation: _____

Email: _____ Telephone: _____ Cell? Y/N

Spouse: First Name: _____ Last Name: _____ DOB: _____

Social Security Number: _____ Occupation: _____

Address: _____ City: _____ State: _____ Zip code: _____

County: _____ Municipality: _____ School District: _____

Email: _____ Telephone: _____ Cell? Y/N

Do you have health insurance through **Health Marketplace** and receive a **1095A**? Yes/No – If **Yes** a copy of the **1095A** is necessary to process your tax return.

Dependent Information:

First Name	Last Name	Date of Birth	Social Security	Did they live with you all year? If no, how many months?

***Proof of residency** is required for **all dependents** which include: healthcare, medical, childcare, or school records which note both **the dependents name and taxpayers address**.

****Please bring social security cards for each person on the tax return. A photo idea is required for both taxpayer and taxpayer's spouse. If you are a new client, a copy of your tax return is required for the prior year.** We will make copies of the information, as the IRS requires us to keep this information on file. Any information provided to us is held strictly confidential and is not disclosed to any third party without your direct written consent. I

*****If you are requesting direct deposit for any return, a voided check is required.**

CERTIFICATION: I hereby certify that, to the best of my knowledge, the provided information is true and correct.

Taxpayer Signature: _____

Date: _____

Taxpayer Signature: _____

Date: _____

Official Use Only – Received by: _____

Date: _____

BURDICK TAX ASSOCIATES LLC

2022 ENGAGEMENT LETTER FOR INDIVIDUAL TAX RETURNS

Thank you for selecting Burdick Tax Associates LLC to assist you in preparing your personal income tax returns. This letter confirms the terms of our engagement and the nature, timing, and limitations of the services we will provide. We will prepare your 2022 federal and state personal income tax returns from information you furnish us. We will not audit or otherwise verify the data you submit, although it may be necessary to request clarification and/or documentation of some of the information. Generally, we will rely on your representation that you have maintained the documentation required by law to support the information you provide, including expenses for meals, travel, gifts, vehicle use, charitable contributions, etc. If you are not clear regarding what documentation is needed for any given item of income or deduction, we would be happy to discuss it with you. **Note that you have the final responsibility for the income tax returns and, therefore, you should carefully review them before you sign and file them.** We require that you provide us with originals or copies of originals of all government tax documents including W-2s, 1099s, 1098s and property tax statements. We will use professional judgment in resolving issues when the tax law is unclear or when there is conflict among the authorities. The filing deadline for the tax returns is April 17, 2023. In order to meet this filing deadline, we must receive your information in substantially complete form by April 1. If an extension of time to file is required, we will use the information available to us at the time to prepare the extension. To prepare a valid, accurate extension, we need as much information as is available.

We also need your express approval to file the extension on your behalf. **An extension, however, only provides you with an extension to file, not an extension to pay. Taxes paid after April 18 will result in late-payment penalties and interest.** The IRS mandates that we electronically file your returns. However, you may opt out of electronic filing with explanation. If you would rather not e-file, please let us know and we will provide you with the government opt-out forms you must sign and return to us. If a joint return is prepared, tax returns and copies of all supporting documentation will be made available to either you or your spouse without the consent or notification of the other spouse. You are responsible for reporting foreign activities. By signing this form, you acknowledge that you will inform us if you have income from foreign sources or if you have signatory authority over any foreign account. If you are unsure whether income or an account is foreign, we will review it. **Note that the penalties for failure to report foreign activities are severe.**

Your tax returns may be selected for review by the taxing authorities. If the government selects your return for examination, we will be available to assist you. At our discretion, there may be additional fees for this service.

We generally retain, for three years, the final work product generated for our clients. After the retention period, the documents are destroyed. We do not keep original documents — they are returned to you after completion of the returns. It is your responsibility to retain your records for possible future use, including possible examination by the taxing authorities.

Our fees for tax preparation services will be expected to be paid at time of service. Tax returns will not be filed electronically until fees are paid.

If you agree to these terms, please sign the acknowledgment below. Work cannot commence until a signed copy of this document is received. If this is a joint return, both spouses must sign.

Acknowledged:

Taxpayer Signature: _____

Print name: _____

Spouse Signature: _____

Print name: _____

BURDICK TAX ASSOCIATES LLC
DBA Burdick Tax Service
6 Damascus Road. Coudersport, PA 16915
Ph. (814) 260-4546 Fax: (814) 320-3926

AUTHORIZATION TO USE TAX RETURN INFORMATION TO PROVIDE OTHER REQUESTED TAX-RELATED SERVICES

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot use or disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use distribution.

You are not required to complete this form to engage our tax return preparation services. If we obtain your signature on this form by conditioning our tax return preparation services on your consent, your consent will not be valid, If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify, If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

Consent - I authorize the use of my tax information to communicate with me via newsletter, e-mail, website, phone or other means of communication with information or data that may be of use to me and, at my request, for the purpose of making recommendations to me, including, but not limited to the following:

- Tax advice related to life events such as marriage, divorce, college expenses, stock option exercises, retirement and estate planning.
- Advice and planning related to tax treatment of investments, including acquisition and sale or exchange of real estate or other assets.
- Year-end tax planning including the preparation of revised estimated tax payments, minimum required distributions; and
- Responding to other tax and financial questions that I may have.

Having full knowledge of my rights in these matters, I affirmatively state that such services are an integral part of the total tax services for which I have contracted with this firm. I hereby authorize this firm to use tax return information, which I furnish, to provide me with tax-related tax services and responses to questions I later raise related to my personal income or business tax matters.

I understand that beyond the specific purpose of providing services I request no tax return information will be disclosed to any other person or for any purpose not specifically allowed by law or by subsequent approval by me.

Duration of your consent (defaults too one year if left blank): _____

Your Name: _____ Spouse's Name: _____

Signature: _____ Signature: _____

Date: _____ Date: _____

*If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by e-mail at complaints@tigta.treas.gov.

Please note that once your return has been filed with the IRS, the IRS controls the timing, balance due, or refund of the return. Burdick Tax Associates LLC is responsible for the preparation and filing only.