

Hi there,

Are you **READY** to file your taxes? Here is how you can make sure you are prepared for your tax appointment. These questions have to be updated every year for your file as well as to alert you of any new questions or updates. **Please be aware if the appointment is missed for ANY REASON without 24 hour notification, there will be a rebooking fee of \$20 added to your prep fees.** (Click in the body of this message to put your answers next to the questions).

NO OTHER FORMS OF TAX PREPARATION WILL BE DONE OUTSIDE THESE INSTRUCTIONS!

- Please answer the following questions & download the mobile app upload your information. Once you submit, please send your tax code and email address used to create your mobile app account to info@keetaxes.com. This information is located in the app on home page or in settings.
- **IF YOU HAVE THE APP FROM LAST YEAR, PLEASE DELETE AND FOLLOW LINK!**
- Mobile Link >>>> <https://taxestogo.com/App/Download/94907>
- **UPLOAD THIS QUESTIONNAIRE**
- Upload a **clear picture** of your **ID**.
- **Upload copy of SSN for you and all dependents.**
- Fill out requested information.
- Submit any W2s, 1099s, 1098s, bookkeeping, receipts, health insurance (INCLUDING UNEMPLOYMENT form 1099G) etc.

IF YOU ARE REQUESTING A FREE CONSULTATION FOR NEW CLIENTS, OLD CLIENTS \$15 ADDED TO PREP FEES, THESE QUESTIONS DO NOT HAVE TO BE ANSWERED UNTIL YOU BOOK A REGULAR APPT AFTER YOUR CONSULTATION.

If own a business, please provide the following.

Name of the company if different from your legal name

EIN (if available)

Address unless you work from home

Do you accept cash, accrual, other?

If you have any write offs, you can provide it as a total amount or an itemized breakdown.

If written down, this paper needs to be signed.

Please answer these questions and send back with all other info prior to appointment:

1. **Did you, your spouse, or a dependent purchase health insurance via HealthCare.gov or a State Marketplace? If so provide 1095A**

2. Are you or dependents disabled?

Do you receive SSI/Disability? How much annually?

3. Did you receive a CP01A notice (Identification pin)?

4. What is your job title/occupation?
5. Please provide your current address, including COUNTY.
6. Did you purchase a home in 2022? (Provide 1098)
7. Do you have a 2022 qualified Mortgage Credit Certificate (MCC) that was issued by a state or local government agency?
8. Do you have any Mortgage Interest Credit carryforward from your 2017, 2018, or 2019 tax returns?
9. Do you pay for childcare? If so, provide childcare form 2441 or baby sitter first & last name, SSN/EIN, address and amount paid.
10. Did you pull from your 401k or retirement benefits?
11. Are you a veteran?
Are you active in duty?
Do you have any expenses associated with being active military?
12. Are you a full-time teacher?
Do you have any expenses associated with being a teacher?
13. Did you receive Qualified Adoption Expenses (Form 8839)? Miscellaneous Adjustments to Income Deduction for Alimony Paid Jury Duty Other Miscellaneous Adjustments
14. Are you involved with cryptocurrency? (Provide summary tax form)
15. Do you have any itemized deductions, such as hospital bills, court fees, property taxes, donations etc.?
16. What service are you most interested in with your taxes? (Simple return, maximize or relieve debt/taxes owed)?
17. Are you interested in any of our other services?
Credit repair
Business setup steps
How to start an Airbnb business
How to start a Turo business
2023 Business Grant list with links
Notary
Life Insurance
Not at this time
18. Did you have any credits disallowed or reduced in a prior year?
19. Have you had your return garnished in previous years?
20. How would you like to pay for you tax preparation (Cash upfront, debit/credit upfront, from my refund)? If select from my refund, Bank fees are \$100.95 in addition to preparation fee which is included in paperwork.

21. Would you like to purchase Audit Protection (79.99)?

Every year the IRS selects 1% to audit review. They usually don't go back pass 6 years. If you are selected for an audit, your professional tax expert should be your first order of contact to help perform what is needed with the audit. This is a good service to have and the fee covers 3 years. If you don't select audit protection and you are subjected to audit review, I am not at liberty to produce anything if I chose not to however, I can give you advice on how to move forward. If you select debt relief or maximized return, you want to be sure to add audit protection.

22. Would you like to purchase identity theft protection plan (Securely ID) (\$69.99)?

23. How would you like to receive your refund? Direct Deposit, check or prepaid card?

POMISE TO PAY: You promise to pay our office any and all amounts billed for services rendered or credit extended under this agreement?

Bank Verification Question: What is your mother maiden name?

Provide and double check

Checking or Savings?

Bank Name:

Routing number:

Account number:

Once return is completed you will need to sign documents via mobile app.

Thank you & talk to you soon.

