ATC TAX Service Intake/Interview and Quality Review Sheet

You will need:

- **Tax Information such as Forms W-2, 1099, 1098, 1095.**
- **Social Security cards or ITIN letters for all persons on your tax return.**
- **Picture ID (such as valid driver's license) for you and your spouse.**

- **Please complete pages 1-4 of this form.**
- **You are responsible for the information on your return. Please provide complete and accurate information.**
- **If you have questions, please ask your Tax Preparer.**

Part I – Your Personal Information (If you are filing a joint return, enter your names in the same order as last year's return)

1. Your first name	M.I.	Last name	SSN	Best contact number	Are you a U.S. citizen? ☐ Yes ☐ No
2. Your spouse's first name	M.I.	Last name	SSN	Best contact number	Is your spouse a U.S. citizen? ☐ Yes ☐ No

3. Mailing address	Apt #	City	State	ZIP code

4. Your Date of Birth	5. Your job title	6. Last year, were you: a. Full-time student ☐ Yes ☐ No b. Totally and permanently disabled ☐ Yes ☐ No c. Legally blind ☐ Yes ☐ No
7. Your spouse's Date of Birth	8. Your spouse's job title	9. Last year, was your spouse: a. Full-time student ☐ Yes ☐ No b. Totally and permanently disabled ☐ Yes ☐ No c. Legally blind ☐ Yes ☐ No

10. Can anyone claim you or your spouse as a dependent? ☐ Yes ☐ No ☐ Unsure

11. Have you, your spouse, or dependents been a victim of tax related identity theft or been issued an Identity Protection PIN? ☐ Yes ☐ No

12. Provide an email address Taxpayer: Spouse:

Part II – Marital Status and Household Information

1. As of December 31, 2023, what was your marital status?

☐ Never Married

☐ Married (This includes registered domestic partnerships, civil unions, or other formal relationships under state law)

a. If Yes, did you get married in 2023? ☐ Yes ☐ No

b. Did you live with your spouse during any part of the last six months of 2023? ☐ Yes ☐ No

☐ Divorced Date of final decree: ____________________

☐ Legally Separated Date of separate maintenance decree: ____________________

☐ Widowed Year of spouse's death: ____________

2. List the names below of:

- **everyone** who lived with you last year (other than your spouse)
- **anyone** you supported, but did not live with you last year

If additional space is needed check here ☐ and list on page 3

Name (first, last) Do not enter your name or spouse's name below.	SSN	Date of Birth (mm/dd/yy)	Relationship to you (for example: son, daughter, parent, etc.)	Number of months lived in your home last year	US Citizen (yes/no)	Resident of US, Canada, or Mexico last year (yes/no)	Single or Married as of 12/31/23 (S/M)	Full-time Student last year (yes/no)	Totally and Permanently Disabled (yes/no)

Check the appropriate box for each question in each section.

Yes	No	Unsure	Part III – Income – Last Year, Did You (or Your Spouse) Receive
☐	☐	☐	1. (B) Wages or Salary? (Form W-2) **If yes, how many jobs did you have last year?** ______
☐	☐	☐	2. (A) Tip Income?
☐	☐	☐	3. (B) Scholarships? (Forms W-2, 1098-T)
☐	☐	☐	4. (B) Interest/Dividends from: checking/savings accounts, bonds, CDs, brokerage? (Forms 1099-INT, 1099-DIV)
☐	☐	☐	5. (B) Refund of state/local income taxes? (Form 1099-G)
☐	☐	☐	6. (B) Alimony income or separate maintenance payments?
☐	☐	☐	7. (A) Self-Employment income? (Forms 1099-MISC, 1099-NEC, 1099-K, cash, digital assets, or other property or services)
☐	☐	☐	8. (A) Cash/check/digital assets, or other property or services for any work performed not reported on Forms W-2 or 1099?
☐	☐	☐	9. (A) Income (or loss) from the sale or exchange of stocks, bonds, digital assets or real estate? (including your home) (Forms 1099-S, 1099-B)
☐	☐	☐	10. (B) Disability income? (such as payments from insurance, or workers compensation) (Forms 1099-R, W-2)
☐	☐	☐	11. (A) Retirement income or payments from pensions, annuities, and or IRA? (Form 1099-R)
☐	☐	☐	12. (B) Unemployment Compensation? (Form 1099-G)
☐	☐	☐	13. (B) Social Security or Railroad Retirement Benefits? (Forms SSA-1099, RRB-1099)
☐	☐	☐	14. (M) Income (or loss) from rental property?
☐	☐	☐	15. (B) Other income? (gambling, lottery, prizes, awards, jury duty, digital assets, Sch K-1, royalties, foreign income, etc.)

Yes	No	Unsure	Part IV – Expenses – Last Year, Did You (or Your Spouse) Pay
☐	☐	☐	1. (B) Alimony or separate maintenance payments? If yes, do you have the recipient's SSN? ☐ Yes ☐ No
☐	☐	☐	2. Contributions or repayments to a retirement account? ☐ IRA (A) ☐ Roth IRA (B) ☐ 401K (B) ☐ Other
☐	☐	☐	3. (B) College or post-secondary educational expenses for yourself, spouse, or dependents? (Form 1098-T)
☐	☐	☐	4. Any of the following? ☐ (A) Medical & Dental (including insurance premiums) ☐ (A) Mortgage Interest (Form 1098) ☐ (A) Taxes (State, Real Estate, Personal Property, Sales) ☐ (B) Charitable Contributions
☐	☐	☐	5. (B) Child or dependent care expenses such as daycare?
☐	☐	☐	6. (B) For supplies used as an eligible educator such as a teacher, teacher's aide, counselor, etc.?
☐	☐	☐	7. (A) Expenses related to self-employment income or any other income you received?
☐	☐	☐	8. (B) Student loan interest? (Form 1098-E)

Yes	No	Unsure	Part V – Life Events – Last Year, Did You (or Your Spouse)
☐	☐	☐	1. (A) Have a Health Savings Account? (Forms 5498-SA, 1099-SA, W-2 with code W in box 12)
☐	☐	☐	2. (A) Have credit card, student loan or mortgage debt cancelled/forgiven by a lender or have a home foreclosure? (Forms 1099-C, 1099-A)
☐	☐	☐	3. (A) Adopt a child?
☐	☐	☐	4. (B) Have Earned Income Credit, Child Tax Credit or American Opportunity Credit disallowed in a prior year? If yes, for which tax year? ______
☐	☐	☐	5. (A) Purchase and install energy-efficient home items? (such as windows, furnace, insulation, etc.)
☐	☐	☐	6. (A) Receive the First Time Homebuyers Credit in 2008?
☐	☐	☐	7. (B) Make estimated tax payments or apply last year's refund to this year's tax? If so, how much? ______
☐	☐	☐	8. (A) File a federal return last year containing a "capital loss carryover" on Form 1040 Schedule D?
☐	☐	☐	9. (A) Have health coverage through the Marketplace (Exchange)? [Provide Form 1095-A]

Additional Information and Questions Related to the Preparation of Your Return

1. Would you like to receive written communications from the IRS in a language other than English? ☐ Yes ☐ No If yes, which language? ____________________
2. Presidential Election Campaign Fund (If you check a box, your tax or refund will not change)
   Check here if you, or your spouse if filing jointly, want $3 to go to this fund ☐ You ☐ Spouse
3. If you are due a refund, would you like: a. Direct deposit ☐ Yes ☐ No b. To purchase U.S. Savings Bonds ☐ Yes ☐ No c. To split your refund between different accounts ☐ Yes ☐ No

   Bank account: ☐ Checking ☐ Savings Routing#__________________________ Account#________________________________
4. If you have a balance due, would you like to make a payment directly from your bank account? ☐ Yes ☐ No
5. Did you live in an area that was declared a Federal disaster area? ☐ Yes ☐ No If yes, where? ____________________
6. Did you, or your spouse if filing jointly, receive a letter from the IRS? ☐ Yes ☐ No
7. Would you like opt-in to receive text messages from us and our affiliates? ☐ Yes ☐ No

Additional comments

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Privacy Act and Paperwork Reduction Act Notice

The Privacy Act of 1974 requires that when we ask for information, we tell you our legal right to ask for the information, why we are asking for it, and how it will be used. We must also tell you what could happen if we do not receive it, and whether your response is voluntary, required to obtain a benefit, or mandatory. Our legal right to ask for information is 5 U.S.C. 301. We are asking for this information to assist us in contacting you relative to your interest and/or participation in our income tax preparation services. The information you provide may be furnished to others who coordinate activities and staff at ATC TAX Service Tax return preparation. The information may also be used to establish effective controls, send correspondence, and train our staff. Your response is voluntary. However, if you do not provide the requested information, the IRS may not be able to accurately process your tax return and can result in penalties and/or legal action.

______________________________ ______________
Taxpayer Signature Date

______________________________ ______________
Spouse Signature Date

Permission Slip/Engagement Letter

ATC TAX SERVICE 17310 STUEBNER AIRLINE RD SPRING, TX 77379

This permission Slip/Engagement Letter is to confirm the arrangements for our tax return preparation services. We will prepare your individual and/or Business Federal and State Tax returns for the calendar year _________in accordance with appropriate tax laws and regulations. Your return will be prepared solely from the information provided by you! For speedy completion of your taxes, please provide any information promptly to our office, if we ask for it. All information is kept confidential! **No one gets your information from us without your permission, except for a government following due process law.**

ALL TAX PREPARATION FEES ARE DUE AND PAYABLE AT THE TIME OF PREPARATION OR PICK UP OF YOUR COMPLETED RETURN(S). THIS YEAR WE ARE REQUIRING A 50% PREPAY ON TAX PREPARATION WITH BOOKKEEPING AT THE TIME OF THE INTERVIEW AND/OR DROP OFF.

TAX PREPARATION SERVICES are based on fee schedule charged per form(s) scheduled needed to complete yours return(s). Fee schedules are displayed on the invoice. Additional charges may include research basis of stocks/bonds or assets sold, NOL's multi-state returns filed, and accounting for an entire year, tax consultation for estimates, amended taxes for prior or current year, FAFSA reports, which are identified separately on your invoice.

OTHER SERVICES provided: Tax audit, tax estimates, accounting, payroll, business consultation, corporation formation, set up of new business, and other services. These are billed at an hourly rate or flat rate and paid on the day of the appointment. The consultation fee is $45. If you have lost or misplaced your tax return copy and would like us to reprint a copy, our fee is $20 per copy.

Minimum fee of $45.00 for any letters we write to IRS or any State Agencies at your request in response to a letter from them. We must have written authorization for any fax request from banks, schools, colleges, etc. There will be a $45.00 minimum charge, payable before we fax the information requested.

Occasionally we make mistakes, please forgive us for being human. Be courteous and let us know if you receive any letters from the government. We correct returns for free, **if we are at fault**. However, **we are not responsible for paying any taxes owed.**

PLEASE REVIEW YOUR RETURN(s) CAREFULLY BEFORE SIGNING AND FILING THEM. If you have any questions, please call us. **THANK YOU** for allowing us to serve you this year! WE **GREATLY APPRECIATE YOUR BUSINESS!** This Engagement Letter will serve to apply to all future years unless the agreement is terminated or amended in writing by the taxpayer or preparer.

Tax Professional Credentials

Our Tax Service is not responsible for providing any of the deductions taken on my tax return(s). I have provided this information from my own records, and I have proof of my deductions and income. I (we) have read the SERVICE DISCLOSURE AND PRIVATE POLICY attached to this letter.

_______________________________________ _______________________

Taxpayer **Date**

_______________________________________ _______________________

Spouse **Date**

NOTE: BOTH MUST SIGN THIS DOCUMENT, IF MARRIED FILING JOINT RETURN (Exception Surviving Spouse)

ATC TAX SERVICE DISCLOSURE

PRIVACY POLICY

Protecting your privacy is fundamental to our business at **ATC TAX.** We honor all applicable privacy regulations, and we further strive to operate our business in a manner that justifies your choice of ATC TAX services. We are providing this privacy policy to you as required by law. This privacy policy explains the types of information we may collect from you and informs you how we may disclose that information.

Who This Policy Covers:

This statement applies to information we collect when we provide financial products and services to customers and formers customers of this ATC TAX office, an independently owned business.

Information We Collect

We may collect information so that we are able to prepare your tax return. This information, referred to in this policy as "tax return information," includes, for example, your name, address, and certain other data such as your social security number, income and deductions data, and other information about you and your dependents that we need to prepare your tax return.

We may collect information in connection with transactions beyond tax return preparation that you complete or propose to complete with us, our affiliates, or others. This information may include, for example, your name, address and certain other "nonpublic personal information" such as checking, debit, credit account numbers, balances and payment history, income, assets, and social security number. "Tax return information" and "nonpublic personal infor- mation" may be collectively referred to as "personal information" in this policy.

We may collect personal information about you from the IRS, our business, and non-affiliated third parties such as credit reporting agencies in connection with transactions you complete or propose to complete with us, our affiliates, and/or our non-affiliated third parties (e.g., personal information about your tax return, tax refund, refund anticipation loans or other loans.)

We, our affiliated or non-affiliated third parties with whom we have business relationships may collect information about you when you inquire about services or request information from us, submit rebate forms, or when you enter contest sponsored by us or third parties. This information may include, for example, your name, telephone number, mailing address and e-mail address.

How We May Disclose Your Information:

Our disclosure of your personal information is controlled by one or more of the following: Section 7216 of the Internal revenue Code; the Gramm Leach Bliley Act of 1999; certain other laws, and ATC TAX policies. We may disclose any of the categories of personal information that we collect (as described above) subject to the terms of this privacy policy.

Section 7216 of the Internal Revenue Code requires that we have your consent before we disclose your tax return information to affiliates or non-affiliated third parties except the Internal Revenue Service (IRS) and law enforcement officials, and exceptions for other lawful purposes. Where this consent is required, we will not disclose your tax return information without your consent.

Information that is identical to specific elements of your tax return information such as name and address, may not be subject to Section 7216 if we also collect this information for purposes other than preparing your tax return. In these situations, we may disclose such information as described in this policy and required or permitted by law (but without regard to Section 7216)

We do not share your nonpublic information with non-affiliated third parties for marketing purposes except as permitted by the Gramm Leach Bliley Act or other applicable law, nor do we sell or rent your personal information to third party direct markers.

We may disclosure your personal information as described below when you have provided consent under section 7216 (Where required), or as otherwise permitted by applicable laws:

If you provided consent under Section 7216, we may disclose your tax return information to our affiliates engaged in banking, investment, credit loans, or home mortgages, insurance, or other financial services activities in order to provide you with service enhancements and product opportunities that we believe may interest you.

We may disclose your personal information to service providers who perform business functions on our behalf. Services such organizations could perform on our behalf may include, for example, check printing, data processing and analysis, contest supervision, and direct mail or e-mail production. We require all service providers to have written contracts that specify appropriate use of your personal information, require them to safeguard your personal information, and prohibit them from making unauthorized or unlawful use of your personal information.

We may disclose your personal information to financial institutions with which we have joint marketing agreements. We require all joint marketers to have written contracts with us that specify appropriate use of your personal informa- tion, require them to safeguard your personal information, and prohibit them from making unauthorized or unlawful use or your personal information.
If a state law (or other law) requires us to give you the right to opt-out prior to any disclosure of personal information for such purposes without providing such opt-out or obtaining your consent.

We may disclose your personal information to affiliates or non-affiliated third parties for other purposes permitted or required by law. Such purposes may include, for example, processing or fulfilling a service you request, or selling or transferring our business assets.

If you elect to obtain a refund anticipation loan, other loan products, a revolving line of credit to pay your tax liability, or if you elect to pay your tax preparation or electronic filing fees from your tax refund, you will be presented with a loan application and agreement and/or refund processing agreement. By accepting these agreements and signing the consent form presented to you, you are authorizing ATC TAX to disclose your personal information to the lending bank.

You should review all agreements and the privacy policies of the lending bank to understand how it may use and disclose your personal information.

How We Protect Your Information:

ATC TAX maintains policies and procedures requiring us to restrict access to your personal information in several ways. These include programs and specifications for physical security and records retention and disposal; computer and communication security measures reflected in systems design, password protection, and management practices; and other measures to restrict access to the data we hold in physical and electronic forms.

How You May Control Use of Your Information:

We may use personal information you provide (subject to your consent, where required) to communicate with you about products and services available through ATC TAX or non-affiliated third parties. If at any time you wish to limit the offers or promotions you receive from us, you may call (281)374-6351. We will make reasonable efforts to comply with your request, although it may still be necessary for us to send you information from time to time about transactions or accounts you have with us, or our affiliates.

X______________________________________ Date:_________________________

Signature